2021 LEADERS BANQUET & AWARD COVERAGE

MARKET INTELLIGENCE ON SPIRITS, WINE AND BEER

NOVEMBER 2021

MARKET WATCH

DELICATO

FAMILY WINEMAKER,
CALIFORNIA PLAYER

PLUS

HOLIDAY ROUNDUP
SPARKLING WINE
MIXOLOGY: CRAFT SPIRITS
ITALIAN AMARO

VISIT…

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Primo Franco
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"Faìve Rosè is the perfect compromise when you would like to drink a structured and full-body wine, with the freshness of a charmat method sparkling wine!"

Silvia Franco
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Nino Franco
NF
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Rosè Brut
Nino Franco
Spumante

"A high-end Prosecco is a little luxury that can be enjoyed in all life's moments, no matter how big or small."

Giuliana Rancic
Co-Owner

"Prosecco is an easy way to bring a bubbly into your life because it's light, fresh and fruity."

Giorgio Marchiotto
Winemaker and Technical Director

"Prosecco Rosé with its complexity and floral notes is a pleasure to drink and easy to enjoy."

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Winemaker

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24

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November 2021

On the cover:
Chris and Jay Indelicato of
Delicato Family Wines
Portrait by Paige Green

PHOTOS BY (TOP LEFT) JONATHAN LOCKWOOD SMITH;
(RIGHT) PAIGE GREEN;
(BOTTOM LEFT) KSENIYA OVCHINNIKOVA/GETTY IMAGES

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PHOTOS BY (TOP LEFT) HALBERGMAN/GETTY IMAGES;
(TOP RIGHT) JEREMY DUECK;
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Honoring The Best

After last year's cancellation, we thankfully were able to toast this year's LEADERS honorees at our annual LEADERS Awards Dinner on September 30. We also finally got the chance to acknowledge members of the class of 2020, who could be part of the festivities this time around and were rightfully applauded by the industry. Held at The Pierre hotel in New York City, the event had all the glitz and glamor of LEADERS dinners past.

Our Retailer of the Year honor this year went to Bob Selby, CEO of Massachusetts-based Kappy's Fine Wine & Spirits. Kappy's is a retail institution in Massachusetts, family-founded in 1940 and family-run ever since. As licensing laws gradually became liberalized in the Bay State over the past decade and the big chains started gaining a foothold, independent players like Kappy's began facing some stiff new competition. But under Selby's stewardship, the company has navigated the storm to achieve new heights of success. Today Kappy's is a nine-location juggernaut, with annual sales of $100 million.

The 2021 LEADERS crew included eight new honorees: Chad Sokol of Costco; Troy Rice of Total Wine & More; John and Kathy Haronian of New England's Wine & Spirits Retail Marketing, Chuck Ferrar and David Marberger of Bay Ridge Wine & Spirits in Maryland; Jimmy Flanigan of Flanigan's Enterprises in Florida; and Blake Leonard of Stew Leonard's Wine & Spirits in the Tri-State area. The LEADERS alumni honors went to Sasha and Gary Vaynerchuk of New Jersey's Wine Library for Best Marketing; Bill, Glen, and Jim Knight of The Wine House in Los Angeles for Best Website; and Dennis and Mat Dinsmore of Wilbur's Total Beverage and Wyatt's Wet Goods in Colorado for Community Service. Our Industry Executive of the Year was Albert Baladi, CEO of Beam Suntory, and our brand awards saw some great winners—including Jose Cuervo Tequila for Spirits Brand of the Year and Bota Box for Wine Brand of the Year. Teremana Tequila took home the award for Best New Product: Spirits, while Unshackled by the Prisoner won Best New Product: Wine.

Here's to all our LEADERS honorees, for 2020 and 2021. Let's hope this year's dinner will be a new beginning for all of us, as we resume the path toward normalcy—and toward greater success than ever.

Enjoy the issue,

Marvin R. Shanken

MARKET WATCH

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THROUGH THE GLASS

Uber Completes Drizly Acquisition…. Uber has completed its acquisition of Drizly for $1.1 billion, originally announced in February. Drizly is now a wholly owned subsidiary of Uber. Drizly’s marketplace will be featured within the Uber Eats app, while also maintaining a separate Drizly app and website, the company notes. “Alcohol remains a key driver of demand from consumers,” says Uber CEO Dara Khosrowshahi. “On the Uber Eats app searches for alcohol items have spiked by 200% in the last year. We can accelerate our shared trajectory by introducing Drizly to Uber consumers and expanding its geographic presence.”

Sycamore Finishes Ste. Michelle Purchase…. New York-based Sycamore Partners has completed its acquisition of Washington-based Ste. Michelle Wine Estates from Altria for $1.2 billion. Announced in July, the deal sees Sycamore gain the largest wine business in the Pacific Northwest—and the eighth-largest in the U.S.—with annual volume of more than 7.3 million cases, according to Impact Databank.

Distributors Increase Focus On Fine Wine…. Southern Glazer’s Wine & Spirits (SGWS) has launched a new fine wine experience on its SGProof e-commerce platform, available across 30 U.S. markets. Carlos Vigil, senior vice president of Proof e-commerce at SGWS says the new experience is “specifically focused on delivering a customized, engaging experience for our customers and our fine wine sales teams that showcases our extensive portfolio of fine wine.” The new offering follows the debut of the distributor’s SG+ enhanced service push across fine wine, artisanal wine, craft and luxury spirits, which has initially been rolled out in Florida and Texas, with additional markets to follow in 2022. Overall, the e-commerce platform currently serves 142,000 customer accounts and has generated $1.4 billion in revenue year-to-date, according to the company. Meanwhile, SGWS competitor Republic National Distributing Co. (RNDC) is aligning its national fine wine business under the moniker The Estates Group. Gable Abdo has been named senior vice president of The Estates Group for the Central Region, while Marin Blomquist will fill the same role in the West. Abdo recently led RNDC’s fine wine business in Texas, while Blomquist held the same position in California. A senior vice president leading the East region will be announced at a later date. RNDC operates across 38 U.S. markets and has projected 2021 revenue of $12.5 billion.

Winc Files IPO…California-based winery Winc has filed to go public in an IPO intended to raise up to $75 million. Winc’s offering includes 5 million shares of common stock, currently expected to be between $14 and $16 per share. The company has applied to list its common stock on the NYSE under the symbol “WBEV.” Winc produces and sells wine directly to its 120,000 monthly members and through the three-tier system, with a presence in 7,700 wholesaler serviced accounts. Brands include Summer Water, Folly of the Beast, Lost Poet, The Wonderful Wine Co., and Cherries & Rainbows. The company says its goal is to continue sgrowing its member base and extend its presence to 50,000 retail accounts in the next half-decade. mw

The Editors

M. Shanken Communications Hosts The 45th Annual Impact Seminar In New York City

Attendees heard from industry leaders from all three tiers at the 45th Annual Impact Marketing Seminar on September 29 at the Pierre hotel in New York City.

PHOTO BY JONATHAN LOCKWOOD SMITH

Industry titans gathered at the Impact Marketing Seminar for the 45th straight year on September 29. The industry’s top players convened at The Pierre in New York City for a packed program hosted by M. Shanken Communications chairman Marvin R. Shanken.

Attendees heard from a variety of leaders from across the industry. They included: Ivan Menezes, CEO of Diageo plc, on “A New Strategy After Covid?”; Ann Mukherjee, chairman and CEO of Pernod Ricard North America, on “Purpose Driven Spirits Marketing;” Wayne Chaplin, CEO of Southern Glazer’s Wine & Spirits, on “The Many Benefits of Charity Marketing;” Troy Rice, COO of Total Wine & More, on “The Future of Retailing as I See It;” José Andrés, founder of ThinkFoodGroup, on “Post Pandemic—The Future of the Restaurant Industry;” David Klein, CEO of Canopy Growth Corp., on “Cannabis Drinks’ Extraordinary Potential;” and Alex Ryan, CEO of Duckhorn Wine Company, on “Becoming a Publicly Traded Wine Company.”

After the morning program, Seminar attendees gathered for a Champagne reception followed by a luncheon in The Pierre’s Wedgewood Room, formerly the hotel’s private nightclub. After the meal, special luncheon speaker Ron DeSantis, governor of Florida, took the podium to weigh in on a variety of hot-button topics. Full coverage of the event will be featured in Market Watch’s December 2021 issue.

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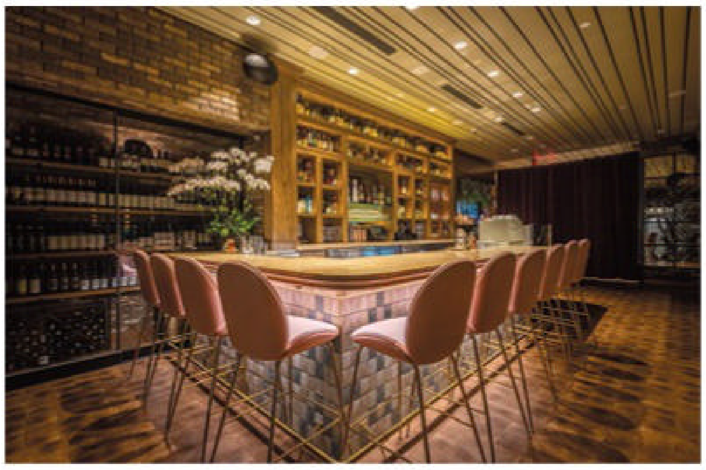
Health-minded drinks, including organic and biodynamic wines, are highlighted at Ancient Spirits & Grille, a 7,000-square-foot venue in Philadelphia.

Philadelphia: Opulence Meets Organic At Herbal Cocktail Lounge

European culture inspired by Indian ayurvedic health and wellness takes center stage at Ancient Spirits & Grille, a mammoth 7,000-square-foot, tri-level space that opened in September in Center City Philadelphia. Friends Syam Namballa and Mahi Reddy created the concept, focusing on herbal cocktails and health-minded drinks and food. Ancient Spirits & Grille's signature drinks include the Ayur Dhatu, comprising Patrón Silver Tequila, house-made falernum and citrus shrub, oat milk, and papaya purée, and the Masala rye, mixed with Rittenhouse rye, Angostura Aromatic bitters, house-made cardamom bitters, and chai syrup (cocktails are $13-$15). The venue also highlights organic and biodynamic wines, listing more than 50 labels from Europe and the U.S. ($8.50-$13 a glass; $44-$100 a 750-ml.), and offers craft beers from both local and global brewers ($7-$9 a draft pour, bottle, or can). The main level at Ancient Spirits & Grille is dominated by a bar, dining room, and lush greenery, including walls accented by plants and water, while the second and third levels have more seating and private events spaces. Guests at Ancient Spirits & Grille can receive personalized drinks recommendations based on their individual health needs and responses to an online assessment about their dosha, an ayurvedic term that relates to a person's mental and physical energy.



Tatel, a popular restaurant originally based in Madrid, is making its debut in Beverly Hills, California.

Beverly Hills, CA: Spanish Concept Makes U.S. Debut

Popular Madrid restaurant Tatel unveiled its first U.S. location in September in Beverly Hills, California, bringing its signature Spanish Mediterranean ambiance stateside. The concept, owned by investment firm Mabel Capital, emphasizes Mediterranean fare and drinks, including cocktails and myriad Spanish wines. Tatel's U.S. unit lists nearly 150 wines ($15-$31 a glass; $55-$115 a 750-ml.), offering Spanish labels like Pazo Barrantes Albariño, Bernabeleva Camino de Navaherreros, and Marques de Riscal Rioja. These complement signature drinks ($18) like the Costa Del Sol, blending coconut-washed Belvedere vodka with Chinola Passion Fruit liqueur and orange blossom water. Tatel Beverly Hills joins the flagship Tatel in Madrid and a location on the beach in Ibiza, Spain.

Wynn is bringing innovative cocktails and a lush atmosphere to Las Vegas' Overlook Lounge.

Las Vegas: Wynn Unveils Casino Cocktail Lounge

Inventive cocktails shine at Wynn Las Vegas' Overlook Lounge, a spirits den that opened in August in the heart of the casino-resort's gaming area. The upscale space boasts a lengthy drinks menu crafted by Wynn mixologist Mariena Mercer Boarini, with menu sections dedicated to spritzes, bespoke drinks, and zero-proof options. Standout cocktails include the Harlow, made with Grey Goose Essences Strawberry & Lemongrass vodka, Italicus Rosolio di Bergamotto liqueur, and lemon juice, topped with Col de' Salici Brut Prosecco. Overlook also lists roughly 20 wines ($14-$38 a glass; $54-$188 a 750-ml.) and 20 beers ($8-$10 a bottle or can), along with a wide variety of sipping spirits.

Laura Pelner

PHOTOS BY (TOP) SOCIETY HILL FILMS; (CENTER) WONHO FRANK LEE; (BOTTOM) ROBERT MILLER

St. Louis: Food Hall Debuts With Large Bar Area

St. Louis' Food Hall at City Foundry STL is a 30,000-square-foot space opening with up to 20 diverse food and drink concepts.

The food hall inside St. Louis' mammoth dining, entertainment, and office space City Foundry STL opened in August with 11 kitchen spaces and a dynamic center bar. Food Hall at City Foundry STL is 30,000 square feet and has space for up to 20 different concepts. The opening selections include dining spaces that serve breakfast, lunch, and dinner and span the globe, including cuisines from Senegal, India, Argentina, and the United States. These are complemented by a central bar, run by Gerard Craft's Niche Food Group, that offers a variety of cocktails and beers. The Kitchen Bar serves specialty drinks like the Fall In A Cup, mixing J. Rieger & Co. Kansas City whiskey, Lazzaroni amaretto, lemon juice, and spicy simple syrup, topped with Brick River Cider's Homestead cider (cocktails are $10-$12). The bar also has a wide variety of beers, including several local labels ($6-$9 a draft pour, bottle, or can), and a couple canned wines ($11). The food hall is just one part of the larger City Foundry STL complex, which is situated in what used to be a 300,000-square-foot manufacturing plant. Located in Midtown St. Louis, the space also houses an outpost of the movie theater-restaurant-beer hall hybrid Alamo Drafthouse and the adult gaming parlor and bowling alley Punch Bowl Social. More restaurants and bars are expected to open at City Foundry STL before the end of the year.

Dallas: Golf-Themed Space Boasts Three Bars

Texas-based Drive Shack Inc., which operates several golf driving range entertainment venues around the country, unveiled its first putting-based concept in September with the opening of Puttery in the Dallas suburb The Colony, Texas. Puttery houses four mini golf courses and three bars, as well as lounge areas and an outdoor terrace. The concept lists classic drinks like a Wild Turkey 101 rye-based Sazerac and Beefeater gin-based French 75 alongside signatures like the Tasty Green, made with Haku Japanese vodka, Tyku Junmai sake, lime juice, cucumber, and basil (cocktails are $10-$18). Puttery also lists several wine options, including Lone Star labels ($12-$14 a glass; $44-$56 a 750-ml.), and offers a variety of beers and hard seltzers ($6-$7 draft pour, bottle, or can).

Puttery, located in the Dallas suburb The Colony, serves upscale cocktails as well as Texas wine labels.

Chicago: Hybrid Space Opens In River North

Decadence abounds at Fame, a bi-level supper club and nightclub that opened in August in Chicago's River North neighborhood. The venue features an upscale restaurant and lounge on its main floor as well as a nightclub and private event space upstairs. Fame's cocktail program includes Prohibition-era drinks and specialties like The Real McCoy, made with Glengarry Blended Scotch, Grand Marnier liqueur, tamarind purée, lemon juice, and agave syrup (drinks are $16-$17). The venue also pours a variety of approachable wines ($12-$20 a glass; $42-$135 a 750-ml.) and beers and seltzers ($7-$8 a can or bottle). Fame is owned by a group of local investors and helmed by Chef Mark Sparacino. mw

Laura Pelner

Fame, Chicago's newest supper club, features Prohibition-era cocktails and upscale fare on its menu.

The Balvenie Tun 1509 Batch 8

William Grant & Sons has launched The Balvenie Tun 1509 Batch 8, the final release in the Tun 1509 series. The 52.3% abv whisky ($410 a 750-ml.) was blended from 18 rare casks selected by malt master David Stewart and rested together for three months in the collection's namesake Tun, or large oak vessel for marrying whiskies. Batch 8 is rolling out now in limited quantities across the U.S. For more information, visit Thebalvenie.com.

The Macallan Harmony Collection Rich Cacao

Edrington's The Macallan has kicked off a new series of limited edition whiskies with The Macallan Harmony Collection Rich Cacao. The collection will trace the brand's trek toward sustainable packaging while showing off select whiskies from The Macallan's library. This release ($160 a 750-ml.) was selected, as its name suggests, for its chocolate-forward flavor profile and was inspired by whisky maker Polly Logan's work with Spanish pastry chef Jordi Roca and chocolatier Damian Allsop. The whisky's box is 100% biodegradable and made from used cacao husks. It's bottled at 44% abv and blends European and American Sherry-seasoned oak casks and is now available globally. For more information, visit Themacallan.com.

BenRiach Malt Season & Smoke Season

BenRiach single malt Scotch whisky, part of the Brown-Forman portfolio, is debuting two new offerings. The first, Malt Season ($149 a 750-ml.), is the first expression in a century to be produced entirely using barley malted from the distillery's floor maltings. The whisky was matured in Bourbon and virgin oak and is bottled at 48.7% abv. The second new product, Smoke Season ($72) is bottled at 52.8% abv. It's billed as the most intensely smoked whisky ever released by BenRiach. For more information, visit Benriachdistillery.com.

Highland Park 15-Year-Old Viking Heart

Edrington has announced Highland Park 15-year-old Viking Heart, the latest permanent addition to the Orkney-based distillery's portfolio. The 44% abv whisky ($110 a 750-ml.) is a new creation and blends Sherry-seasoned European and American oak barrels with a little bit of whisky matured in refilled barrels previously used to age Highland Park's malts. The whisky comes in an embossed ceramic bottle and will hit shelves across America around the beginning of November. For more information, visit Highlandparkwhisky.com.

The Dalmore 2021 Edition

The Dalmore, part of the *Whyte & Mackay* portfolio has launched a new, ultra-limited, 30-year-old whisky in the U.S. The Dalmore 2021 Edition ($5,500 a 750-ml.) is bottled at 42.8% abv and matured in ex-Bourbon barrels before finishing in Tawny Port pipes from Graham's. Only 200 bottles of the 2021 Edition will be released in the U.S., available at retailers like Total Wine, Wally's, and Wine.com, among others. For more information, visit Thedalmore.com.

Writers' Tears Icewine Cask Finish

Walsh Whiskey has released a new limited-edition whiskey in the Writers' Tears family. Writers' Tears Icewine Cask Finish ($85 a 750-ml.) is a blend of Irish single malt and pot still whiskies finished in Inniskillin casks from Ontario, Canada for 12 months. 3,500 bottles of the 46% abv whiskey are being distributed to select retailers in Canada, Ireland, and the U.S. Hotaling & Co. imports Writers' Tears in the U.S. For more information, visit Walshwhiskey.com.

Wild Turkey Master's Keep One

Wild Turkey has announced Master's Keep One, the sixth release in the distillery's limited edition Master's Keep series. The latest release ($175 a 750-ml.) blends whiskies aged between eight and ten years with an older, 14-year-old Bourbon, in a collaboration that blends the preferences of master

THE BALVENIE TUN 1509 BATCH 8

THE MACALLAN HARMONY COLLECTION RICH CACAO

BENRIACH MALTING SEASON

HIGHLAND PARK 15-YEAR-OLD VIKING HEART

distillers Jimmy and Eddie Russell. Jimmy favors 8-10-year-old Bourbon, while Eddie prefers slightly older whiskies. Following the initial blending, the combined whiskies matured for a second period in new toasted and charred oak barrels. Master's Keep One is bottled at 50.5% abv and is available for a limited time in select retailers across the U.S. For more information, visit Wildturkeybourbon.com.

TX Straight Bourbon Whiskey Finished in Cognac Casks

Firestone & Robertson Distilling Co., part of the Pernod Ricard portfolio, has launched TX Straight Bourbon Whiskey Finished in Cognac Casks, the latest release from the Fort Worth-based distiller. The 50.8% abv whiskey ($65 a 750-ml.) is the third release in the Barrel Finish series, following Tawny Port and PX Sherry Cask finished whiskies. This release also marks the end of master distiller Rob Arnold's tenure with F&R, as he is now stepping aside, allowing Ale Ochoa, master blender, and new master distiller Evan Brewer to take the helm. TX Straight Bourbon Whiskey Finished in Cognac Casks is rolling out now throughout Texas. For more information, visit Frdistilling.com.

Garrison Brothers 2021 Cowboy Bourbon

Texas-based *Garrison Brothers* has introduced its limited edition 2021 Cowboy Bourbon. The liquid is bottled at cask-strength. This year's batch ($230 a 750-ml.) clocks in at a stout 65% abv. Garrison Brothers 2021 Cowboy Bourbon is rolling out in a limited supply of 5,440 bottles across its 42-state footprint. It's packaged in a custom-built solid wood gift box lined with a satin pillow and weighty medallion announcing the release year around the bottle's neck. For more information, visit Garrisonbros.com.

High West A Midwinter Night's Dram Act 9

Park City, Utah's *High West Distillery* has announced the latest edition of A Midwinter Night's Dram, its Port-finished rye whiskey. This year's release, Act 9 ($100 a 750-ml.), is bottled at 49.3% abv and is blended from Rendezvous Rye finished in Tawny and Ruby Port barrels for one to two years. A Midwinter's Night Dram Act 9 is now available at High West General Store in Old Town Park City and at the High West Distillery in Wanship, Utah. For more information, visit Highwest.com.

Five Trail Blended American Whiskey

Molson Coors has entered the spirits category with Five Trail blended American whiskey. The 47.5% abv whiskey ($60 a 750-ml.) is blended from three Bourbons, including a four grain recipe and a 13-year-old Bourbon, along with a Colorado single malt. Molson Coors' initial foray into brown spirits was made in a partnership with Kentucky's Bardstown Bourbon Co. Five Trail is now available in Colorado, Georgia, Nevada, and New York. For more information, visit Fivetrail.com.

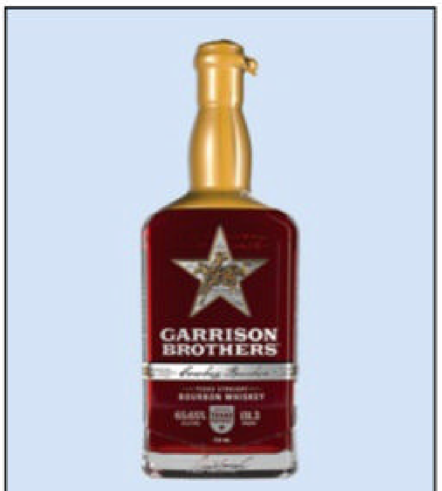
Redemption Cognac Cask Finish

Deutsch Family Wine and Spirits' Redemption Whiskey has launched its latest limited release, a Bourbon finished in Cognac barrels. The new whiskey ($70 a 750-ml.) brings together Redemption and Maison Ferrand's namesake Cognac by finishing the former's high-rye Bourbon in the latter's casks. After its initial maturation the whiskey spent a year in Ferrand Cognac casks before bottling at 49.5% abv. Redemption Cognac Cask Finish Whiskey is now available nationwide, while supplies last. For more information, visit Redemptionwhiskey.com.

Hennessy Dame Jeannes

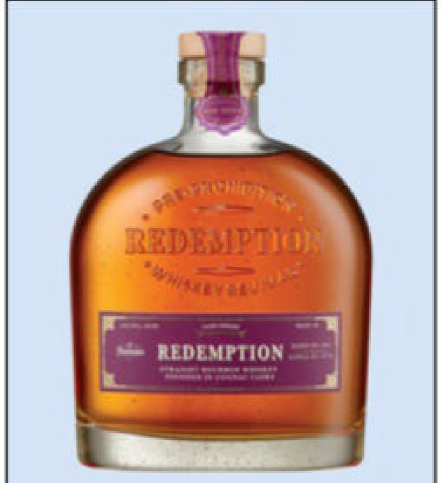
Hennessy is releasing two ultra-luxury Dame Jeannes. A Dame Jeanne is a vessel, traditionally covered in wicker, to store eau-di-vie preserved for future blending of Hennessy. Each Dame Jeanne (which will retail around $700,000 a 750-ml.) will house a personalized blend made by master blender Renaud Fillioux de Gironde, with each vessel itself also customized, monogrammed and presented to its buyer in Cognac by the master blender. For more information, visit Hennessy.com.

TX STRAIGHT BOURBON WHISKEY



GARRISON BROTHERS 2021 COWBOY BOURBON

HIGH WEST A MIDWINTER NIGHT'S DRAM ACT 9



REDEMPTION COGNAC CASK FINISH

COME AS YOU ARE.
LEAVE AS MORE.
V·S·O·P
Hennessy
MORE IS MADE
BY THE MANY
Hennessy
V·S·O·P Privilège
Never stop. Never settle.
Hennessy
V·S·O·P
Privilège

PLEASE DRINK RESPONSIBLY. Imported Cognac Hennessy®, 40% Alc./Vol. (80°). ©2021 Imported by Moët Hennessy USA, Inc., New York, NY. HENNESSY is a registered trademark.

St-Rémy Signature

Rémy Cointreau has added a new brandy to the St-Rémy portfolio in the U.S. St-Rémy Signature ($30) is bottled at 40% abv and is first matured in new oak before transferring to more traditional used casks. St-Rémy Signature is the first spirit created by the brand's master blender Cécile Roudaut and is rolling out now in select markets across the U.S. For more information, visit St-remy.com.

Inspiro Tequila

Chicago-based *Inspiro Tequila* has introduced its first expression, Luna Blanco, a gluten-free and additive-free 100% blue agave Blanco Tequila containing 0 sugar and 0 carbs. Inspiro's initial offering ($53 a 750-ml.) is rested in American oak barrels for a lunar quarter and packaged in a custom-designed bottle. It's currently available online, with distribution to select local markets coming soon. For more information, visit Inspirotequila.com.

The Producer Mezcal

The Producer, a new mezcal brand, is rolling out now in the U.S., making its debut with two expressions: Ensamble ($47 a 750-ml.) and Tepeztate ($98). The 40.2% abv Ensamble is made from 7-year-old Espadín agave plants and 9-year-old Cuishe agave plants that are distilled in a copper pot still following open-air fermentation. Tepeztate is also bottled at 40.2% abv and is made from agave plants sourced from Sierra Sur, Oaxaca, a coastal region. The wild agave for this mezcal is harvested after roughly 16 years. For more information, visit Producermezcal.com.

Engine Gin

Disaronno International has launched Engine gin, a new Italian spirit designed by Paolo Dalla Mora, former CMO at Moschino and global communications director for parent company Illva Saronno. The 42% abv gin ($30 a 750-ml.) is made with juniper and a variety of Italian botanicals like Ligurian sage, lemon, licorice root, and damask rose. The gin is packaged in a tin mock-oil-can, evoking its creator's passion for racing and cars. Engine is now available across the U.S. For more information, visit Engine.land.

Sammy's Beach Bar Cocktail Co.

Musician and entrepreneur Sammy Hagar has entered the RTD cocktail category with *Sammy's Beach Bar Cocktail Co*. The new line of rum-based cocktails ($19 a 4-pack of 12-ounce cans) comes in at 5.5% abv and 130 calories per 12-ounce serving. Initially, Sammy's Beach Bar Cocktail Co. will launch with four flavors—Tangerine Dream, Pineapple Splash, Island Pop, and Cherry Kola Chill—in California, Texas, and Nevada, with further expansion coming soon. For more information, visit Sbbcco.com.

Nütrl Vodka Seltzer

Anheuser-Busch has launched Nütrl, a new vodka based RTD, in 11 states across the U.S. The 4.5% abv seltzers are made from vodka, sparkling water, and fruit juice. Nütrl ($15 a 4-pack of 355-ml. cans) has no added sugar and each serving comes in at 100 calories. Initially, the brand will launch with three flavors—Raspberry, Watermelon, and Pineapple. While the initial launch is focusing on 11 markets, the company is planning to increase distribution throughout the rest of the year. For more information, visit Nutrlvodka.com.

PiggyBack Rye Smash

WhistlePig has introduced a ready-to-drink craft rye expression, PiggyBack Rye Smash. Made with 100% estate rye from WhistlePig's 500-acre Vermont farm, the new entry ($18 a 4-pack of 12-ounce cans) comes in three flavors—Blackberry Lemon Fizz, Session Citrus Mint, and Fresh Ginger Lime—and initially is rolling out in Georgia, Missouri, Vermont, Massachusetts, and Rhode Island, ahead of next year's national launch. For more information, visit Whistlepigwhiskey.com.

Whisper Creek Spiked Coffee

Nashville, Tennessee's *Pennington Distilling Company* has launched Whisper Creek Spiked Coffee, a new offshoot from its Whisper Creek Tennessee Sipping Cream. The canned RTDs ($12-15 a 4-pack of 200-ml. cans) come in at 12.5% abv and blend Whisper Creek's cream liqueur with cold brew coffee. The Spiked Coffees come in two varieties—Mocha

ST-RÉMY
Signature

ST-RÉMY SIGNATURE

INSPIRO
TEQUILA

INSPIRO TEQUILA

ENGINE
FUEL THE DREAM
Pure organic Gin
01

ENGINE GIN

BEACH BAR
COCKTAIL
PINEAPPLE SPLASH

SAMMY'S BEACH BAR COCKTAIL PINEAPPLE SPLASH

and an unflavored blend of coffee and cream—and are available throughout the southeast. For more information, visit Penningtondistillingco.com.

Rutherford Reserve Cabernet Sauvignon

Napa Valley's Beaulieu Vineyard, part of the *Treasury Wine Estates* portfolio, has debuted a new Rutherford Reserve Cabernet Sauvignon. The new offering ($80 a 750-ml.) is sourced from Beaulieu's vineyard blocks BV Ranches No. 1, No. 2, and No. 10 in the Rutherford AVA. A blend of 90% Cabernet Sauvignon, 6% Malbec, and 4% Petit Verdot, the wine spent 21 months in 100% French oak, 80% of which were new barrels. Rutherford Reserve Cabernet Sauvignon is available nationwide. For more information, visit Rutherfordranch.com.

Della Vite

Model, actress, and socialite sisters Chloe, Poppy, and Cara Delevingne are launching a Prosecco brand called *Della Vite*. Cara and her sisters are launching the brand with two releases timed to New York Fashion Week: Della Vite Prosecco Superiore DOCG ($30 a 750-ml.) and Della Vite Prosecco Treviso DOC ($25). The wines come from a solar-powered vineyard and are made without the use of any animal products, making them fully vegan. Della Vite is available nationwide. For more information, visit Dellavite.com.

Relax Prosecco DOC

Germany's Schmitt Söhne, imported by *Delicato Family Wines* in the U.S., is extending its Relax brand into Prosecco. Relax Prosecco DOC ($15 a 750-ml.) is available nationwide. For more information, visit Relaxwines.com.

Ten of Cups Brut California NV

Banshee Wines, part of the *Foley Family Wines* portfolio, is entering the sparkling segment with Ten of Cups Brut California NV. Inspired by the namesake Tarot card, the limited-production release is a Méthode Champenoise blend of Chardonnay, Pinot Noir, and Pinot Meunier ($28 a 750-ml.) It's hitting select markets this fall ahead of a national rollout next year. For more information, visit Bansheewines.com.

Veuve de Vernay Sparkling Alcohol Removed

Veuve de Vernay, part of the Barton & Guestier portfolio of brands, is introducing a new alcohol-free sparkling wine. Veuve de Vernay Sparkling Alcohol Removed ($15 a 750-ml.) is made from 100% Muscat grapes without added sugar. The new entry joins Sparkling Ice, Brut, and Brut Rosé, all available nationwide. For more information, visit Veuvedevernay.com.

Astoria Prosecco Rosé D.O.C.

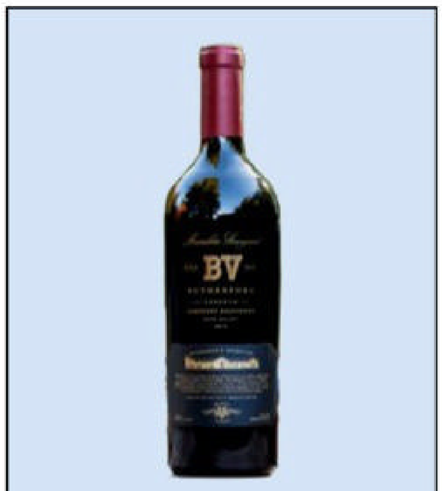
Minnesota-based *Prestige Beverage Group* has expanded its Astoria wine brand from Italy with a Prosecco rosé D.O.C. The new rosé ($15 a 750-ml.) joins Prosecco D.O.C., Spago Prosecco D.O.C., "Alisia" Pinot Grigio D.O.C., "Caranto" Pinot Noir, "Icona" Cabernet Sauvignon, Primo Rosso, Sparkling Moscato, and Sparkling Moscato rosé in the Astoria portfolio. Prestige Prosecco rosé D.O.C. is available nationwide. For more information, visit Prestigebevgroup.com.

Adaptation Napa Cab

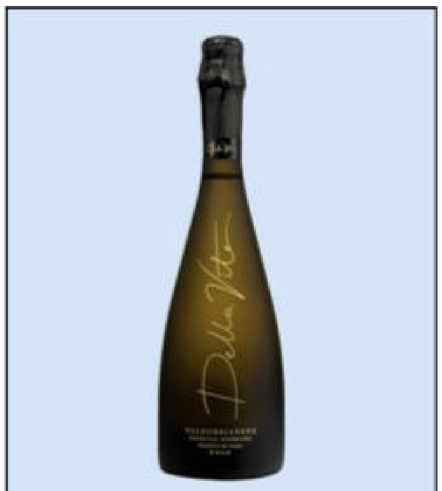
Napa, California's *The Plumpjack Collection of Wines* has released Adaptation, the company's latest Napa Cab. The wine ($78 a 750-ml.) from the 2018 vintage, is sourced from vineyards in Howell Mountain, Oak Knoll, Stags Leap, and Carneros, and is a blend of 80% Cabernet Sauvignon, 18% Merlot, and 2% Petite Sirah. The wine was made by Jeff Owens and aged in 50% new oak and 50% one-fill oak barrels for 18 months before bottling. Adaptation is now available nationwide. For more information, visit Plumpjackwines.com.

Ink Grade

Carlton McCoy, Jr. and the Lawrence family have officially launched *Ink Grade*, a new luxury wine brand. The Ink Grade Estate Vineyard, with 200 acres under vine, lies in the northeast corner of the Howell Mountain AVA in Napa Valley, at about 1,500 feet of elevation. Ink Grade's initial range includes Andosol Zinfandel ($95 a 750 ml.), Howell



RUTHERFORD RESERVE
CABERNET SAUVIGNON



DELLA VITE
PROSECCO SUPERIORE D.O.C.G.

RELAX
PROSECCO DOC

BANSHEE
TEN OF CUPS BRUT NV

Mountain Cabernet Sauvignon ($225), and Napa Valley Sauvignon Blanc ($65). Ink Grade is available nationwide. For more information, visit Napavalley.wines.

Iron Side Cellars Red Blend

California winemaker *Iron Side Cellars* is launching a Bourbon Barrel Aged Red Blend. The blend ($15 a 750-ml.) features Merlot and Petite Sirah grapes grown primarily in the Lake County AVA and aged in Bourbon barrels sourced from Kentucky. *Iron Side Cellars'* first Bourbon barrel-aged offering is available now in 14 states. For more information, visit Ironsidecellars.com.

Sierra Nevada Atomic Torpedo IPA

Sierra Nevada Brewing has debuted Atomic Torpedo, billed as a juicy West Coast Double IPA. The 8.2% abv brew ($20 a 12-pack of 12-ounce bottles) includes Cascade, Centennial, Mosaic, and Magnum hops and fuses West and East Coast IPA styles. It's available exclusively in Sierra Nevada's Hoppy Sampler Pack, which also includes Sierra Nevada Pale Ale, Torpedo Extra IPA, and Dankful IPA. The Hoppy Sampler Pack is available nationwide. For more information, visit Sierranevada.com.

Beer City Rye IPA

Comstock Park, Michigan's *Perrin Brewing Co.* has launched Beer City Rye IPA, a new collaboration with local baker Beer City Bread Co. The 8% abv ale ($12 a 6-pack of 12-ounce cans) is brewed with American hops and has toasted rye bread from Beer City added directly to the mash. Beer City Rye IPA is currently available at the Perrin Pub with statewide distribution coming soon. For more information, visit Perrinbrewing.com.

Master of Pumpkins

Hershey, Pennsylvania-based *Tröegs Independent Brewery* has launched fall seasonal Master of Pumpkins across its footprint. The 7.5% abv brew ($15 a 4-pack of 16-ounce cans) is made with pumpkins as well as spices including cinnamon, clove, ginger and nutmeg, and is available in Connecticut, Washington, D.C., Delaware, Massachusetts, Maryland, North Carolina, New Jersey, New York, Ohio, Vermont, and Pennsylvania. For more information, visit Troegs.com.

Freezin' Season Winter Ale

Maryland-based *Flying Dog Brewery* has introduced a new winter seasonal, Freezin' Season Winter Ale. Replacing former seasonal brew K-9, Freezin' Season ($15 a 6-pack of 12-ounce bottles) is a 7.4% abv beer made with the English Ale yeast strain. It is available now in Flying Dog's 24-state footprint. For more information, visit Flyingdog.com.

Death by Coconut Irish Porter

Longmont, Colorado-based *Oskar Blues Brewery* has announced the return of its seasonal offering, Death by Coconut Irish Porter. Death by Coconut ($11 a 4-pack of 12-ounce cans) clocks in at 6.5% abv and is brewed with added coconut and chocolate. The Porter is now available nationwide. Oskar Blues is part of the Canarchy Collective of breweries. For more information, visit Oskarblues.com.

Fireside Chat

21st Amendment Brewery is ringing in the 2021 holiday season with the release of their beloved winter spiced ale, Fireside Chat. The ale ($10 a 6-pack of 12-ounce cans) comes in at 7.9% abv and is an English-style strong brew with notes of chocolate and winter spices. Fireside Chat is available in 33 states now through December. For more information, visit 21st-amendment.com.

Sam Smith's Winter Welcome

Samuel Smith Brewery has released Sam Smith's Winter Welcome. This seasonal beer ($11 a 4-pack of 12-ounce bottles) is a limited edition, full-bodied beer brewed for the short days and long nights of winter. The brew comes in at 6% abv and is billed as an appealing option for all kinds of beer drinkers. Sam Smith's Winter Welcome is available nationwide throughout the winter months. For more information, visit Samuelsmithsbrewery.co.uk.

The Editors

SIERRA NEVADA ATOMIC TORPEDO IPA

PERRIN BEER CITY RYE IPA

TROEGS MASTER OF PUMPKIN

FLYING DOG FREEZIN' SEASON WINTER ALE

GET TO KNOW THE SPIRITS OF

E.&J. Gallo

HIGH NOON
CAMARENA TEQUILA
RUMHAVEN
RUMCHATA
PINK WHITNEY
NEW AMSTERDAM
NEW AMSTERDAM GIN
NEW AMSTERDAM VODKA
AMARO MONTENEGRO
THE DALMORE
E&J V.S.O.P
SELECT

DISCOVER THE PORTFOLIO

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Hands-on Approach

In Nashville, Robert Longhurst plays with spirits he helped develop

Not many bartenders have the opportunity to create cocktails with spirits that they themselves created, but that's exactly what Robert Longhurst gets to do on a regular basis. In 2016, when he was managing at a neighborhood bar in Nashville, Longhurst began experimenting with creating his own coffee-infused rye whiskey. As luck would have it, Bob Angus, CEO of the beverage company Four Blue Palms, was a frequent guest of this bar and took an interest in Longhurst's whiskey creation. The two hit it off and quickly jumped into business together. Longhurst joined the Four Blue Palms team as creative director, helping launch Standard Proof Whiskey Co. in 2017, with the coffee-infused Red Eye Rye as its first product.

At the Standard Proof Whiskey Co. tasting room in Nashville, Robert Longhurst develops cocktail recipes that include spirits he helped create.

Since then, Standard Proof Whiskey Co. has released eight additional expressions of rye, most of which are infused with natural ingredients, such as ginger root, mint, and pecan. As creative director, Longhurst works with the Standard Proof team on development of new products and brand direction, and he also created the concept, design, and beverage program for the company's first tasting room and bar, which opened in Downtown Nashville in 2020. "I wanted this to be a home for our brand—not in the way of a classic distillery, but a facility that could be a playground for creative bartenders," Longhurst says. "We get to use great whiskey and different ingredients to create some very unique spirits and cocktails that other distilleries and bars can't."

In addition to sampling from the Standard Proof lineup, patrons of the tasting room can also enjoy a range of cocktails ($10-$15) developed by Longhurst. "Simple cocktails made very well have always been the most impressive to me, as it's all about the quality of ingredients and the method of preparation," he says. "A couple of my favorites that really showcase this approach are the Smoked Old Fashioned and Wildflower Lemonade." The former drink ($12) is infused with cherry wood smoke and comprises Standard Proof straight rye whiskey, simple syrup, and Angostura bitters, while the latter ($12) features Standard Proof wildflower rye whiskey—which is infused with honeysuckle— as well as lemon juice, simple syrup, and sparkling water. "I love developing these spirits and seeing all of the ways other bartenders use them," Longhurst adds. "There are some very talented bartenders all over the country and I'm very lucky to have enjoyed some great cocktails that use products I had a hand in creating."

Sally Kral

Robert Longhurst's Recipes

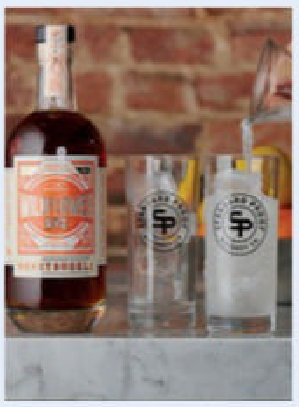
Smoked Old Fashioned

INGREDIENTS:

2 ounces Standard Proof straight rye whiskey;
¼ ounce simple syrup;
4-5 dashes Angostura bitters;
1 untreated plank of cherry wood;
Orange peel.

RECIPE:

Start by scorching the cherry plank and then place a rocks glass upside down over the burned wood to allow the glass to fill with smoke. While the glass seasons, stir the rye, syrup, and bitters with ice in a mixing glass. Strain the chilled ingredients into the smoked glass and add one large ice cube. Garnish with an orange peel.



Wildflower Lemonade

INGREDIENTS:

2 ounces Standard Proof wildflower rye whiskey;
1 ounce lemon juice;
1 ounce simple syrup;
2 ounces sparkling water.

RECIPE:

In an ice-filled Collins glass combine rye, juice, and syrup. Top with sparkling water.

2021 LEADERS AWARDS DINNER

MARKET WATCH HONORS THE NATION'S TOP RETAILERS

PHOTOGRAPHS BY JONATHAN LOCKWOOD SMITH

MARKET WATCH
LEADERS
2021
BLAKE LEONARD

Industry members gathered at the 2021 MARKET WATCH LEADERS awards dinner at The Pierre hotel in New York City on September 30.

MARKET WATCH magazine hosted its annual LEADERS Awards Dinner, a black-tie affair that honors the nation's top beverage alcohol retailers, at The Pierre hotel in New York City on September 30.

Market Watch's Retailer of the Year Award was given to Bob Selby, CEO of eastern Massachusetts-based Kappy's Fine Wine & Spirits. Selby joined his family business on a part-time basis in 1968 and transitioned to full-time in 1974. His incredible management of the business is part of the reason Kappy's brings in its current annual revenue of $100 million. Selby was originally named a LEADER in 2013 and has since grown his business from three stores to nine, with plenty of room for future growth.

The industry Executive of the Year Award went to Albert Baladi, CEO of Beam Suntory. Baladi has been a driving force behind the growth of spirits giant Beam Suntory since his start at the company, then known as Beam Inc., in 2011. Baladi worked his way through several different positions until he was named CEO of Beam Suntory in total, a role he assumed in April 2019.

Eight new LEADERS from six companies were honored at this year's awards dinner. Here's a look at the LEADERS Class of 2021:

Chad Sokol of Issaquah, Washington-based Costco Wholesale Corporation. Sokol was originally hired as a part-time seasonal employee in 1994. Today, he oversees the beverage alcohol sector, which topped $5 billion in global beverage alcohol sales in 2020.

Troy Rice of Bethesda, Maryland-based Total Wine & More. Though Rice has been in the alcohol business for just five years, his leadership has led Total Wine to see revenue of over $5 billion in 2020. His dedication to the business and focus on e-commerce and customer service have led Total Wine & More to continued outstanding success.

John Haronian and Kathy Haronian of Rhode Island and Massachusetts-based Wine & Spirits Retail Marketing. This father-and-daughter duo operates a consulting firm and franchising business, leading smaller beverage alcohol retailers to success. Wine & Spirits Retail Marketing oversees 14 locations in two states and sees annual revenue of $80 million.

MARKET WATCH
LEADERS
2021
RETAILER OF THE YEAR
BOB SELBY
Kappy's Fine Wine & Spirits
September 30, 2021
Market Watch Leaders Banquet

2021 Market Watch Leaders Retailer of the Year Bob Selby of Kappy's Fine Wine & Spirits.

Chuck Ferrar and David Marberger of Annapolis, Maryland-based Bay Ridge Wine & Spirits. This father and son-in-law showcase a commitment to customer service and the satisfaction of their patrons, an attitude toward business that has resulted in a new brick-and-mortar location and major revenue growth.

Jimmy Flanigan of Flanigan's Enterprises in South Florida. Flanigan learned the beverage alcohol business at his father's knee, and through hard work and a devotion to the family business he's become CEO, chairman, and president of Flanigan's Enterprises, which encompasses the Big Daddy's retail chain and Flanigan's Seafood Bar and Grill. His hybrid on- and off-premise business model is now a $143 million franchise.

Blake Leonard of Stew Leonard's Fine Wine & Spirits. Leonard, daughter of 2010 MARKET WATCH LEADER Stew Leonard, has been part of the family business for most of her life. In adulthood, she has driven the tri-state area family business toward success by homing in on the best products in every category, and employing a knowledgeable staff of 300 employees.

Seven LEADERS alumni were honored for excellence in marketing, website innovation, and community service. Father and son Sasha and Gary Vaynerchuk of Springfield, New Jersey's Wine Library were given the Best Marketing award, while Best Website was awarded to another father-and-sons team: Bill, Glen, and Jim Knight of Los Angeles-based The Wine House.

The Community Service award went to yet another father-son duo, Dennis and Mat Dinsmore of northern Colorado's Wilbur's Total Beverages and Wyatt's Wet Goods.

The market's top brands were also recognized at the LEADERS dinner. Proximo's Jose Cuervo Tequila was awarded Spirits Brand of the Year, with the Wine Brand of the Year award going to Bota Box from Delicato Family Wines. The Best New Spirits Product went to Teremana Tequila from Mast-Jägermeister, while Unshackled by The Prisoner Wine Co. and Constellation Brands took home the Best New Wine Product award.

LEADERS
2021
BLAKE LEONARD
Stew Leonard's Wines & Spirits

2021 MARKET WATCH LEADER Blake Leonard of Stew Leonard's Wine & Spirits in Norwalk, Connecticut.

LEADERS
2021
CHAD SOKOL

2021 MARKET WATCH LEADER Chad Sokol of Costco Wholesale Corp. in Issaquah, Washington.

LEADERS
2021
TROY RICE

2021 MARKET WATCH LEADER Troy Rice of Total Wine & More in Bethesda, Maryland.

LEADERS
2021
LEADERS
2021
CHUCK FERRAR

2021 MARKET WATCH LEADERS David Marberger & Chuck Ferrar of Bay Ridge Wine & Spirits in Annapolis, Maryland.

Sasha & Gary Vaynerchuk of The Wine Library in Springfield, New Jersey won the 2021 LEADERS Alumni Award for Best Marketing.

Glen & Jim Knight of The Wine House in Los Angeles, California won the 2021 LEADERS Alumni Award for Best Website.

Mat & Dennis Dinsmore of Wilbur's Total Beverage in Fort Collins, Colorado won the 2021 LEADERS Alumni Award for Community Service.

Joe Fortune of Mast-Jägermeister accepted the award for 2021 Best New Product: Spirits for Teremana Tequila.

Joe Reed and Dawn Felicio of Constellation Brands accepted the award for 2021 Best New Product: Wine for Unshackled.

Mike Keyes of Proximo Spirits accepted the 2021 LEADERS Choice Brand of the Year: Spirits award for Jose Cuervo.

Chris Indelicato of Delicato Family Wines accepted the 2021 LEADERS Choice Brand of the Year: Wine award for Bota Box.

MARKET WATCH
LEADERS
2021
INDUSTRY EXECUTIVE
OF THE YEAR
ALBERT BALADI
President & CEO
Beam Suntory

Albert Baladi of Beam Suntory was named the 2021 Market Watch Leaders Industry Executive of the Year.

Steve Selby, Anne Selby, Bob Selby, and Joe Selby of Kappy's Fine Wine & Spirits.

TOP ROW, FROM LEFT: Michael Moaba of M. Shanken Communications, Roger Nabedian of E. & J. Gallo, Pete Carr of Diageo North America, Mike Keyes of Proximo Spirits, and Wayne Chaplin of Southern Glazer's Wine & Spirits. BOTTOM ROW, FROM LEFT: Claudia Schubert of Diageo North America, Bill Terlato of Terlato Wine Group, Gary Fisch of Gary's Wine & Marketplace, Barbara Banke of Jackson Family Wines, Albert Baladi of Beam Suntory, and Ann Mukherjee of Pernod Ricard USA.

Windy Koizumi (left) and Albert Baladi (right) of Beam Suntory with John Wittig of Southern Glazer's Wine & Spirits.

Vincent Chiaramonte of Santa Margherita USA and Rob Scheele of Deutsch Family Wine & Spirits.

Mauricio Vergara of Bacardi and Peter Angus and Tim Burke of Tito's Handmade vodka.

Katie Fremstad and Jason Fremstad of Walmart.

Lauren Knight, Kelly Nicolas, Glen Knight of The Wine House, and Troy Rice of Total Wine & More.

David Jabour of Twin Liquors, Sylvia Jabour, and Pete Carr of Diageo North America.

Tim O'Hara and Justin Argenti of Shaw-Ross International.

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Daviess County
Deanston
deBorgen
Dewar's
Dingle Distillery
Eight Settlers
Elijah Craig
Endless West
Ezra Brooks
FEW
Four Roses
Frey Ranch Whiskeys
Fuji Whiskey
Gentleman Jack
George Dickel
Glen Moray
Glendalough
Glenmorangie
Glyph
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Heaven Hill
Heaven's Door
Henry McKenna
Hirsch
Hooghdout
Jack Daniel's
Jefferson's
Larceny
Laws Whiskey
Ledaig
Limavady
Michter's
Middle West Spirits
Mossburn
Nikka
Notaris
Old Fitzgerald
Old Forester
Old Potrero
Old Pulteney
OYO
Parker's
Paul John
Peerless
Rabbit Hole
Rebel Bourbon
Redbreast
Rod & Hammer's SLO Stills
The Sexton
Shenk's
Skrewball
Smooth Ambler
Speyburn
St. George Spirits
Stranahan's
Stubs
Templeton
Tobermory
Torabhaig
Uncle Nearest
Vim & Petal Gin
Virginia Distillery Co.
Westward Whiskey
WhistlePig
Widow Jane
Woodford Reserve
Yellow Rose

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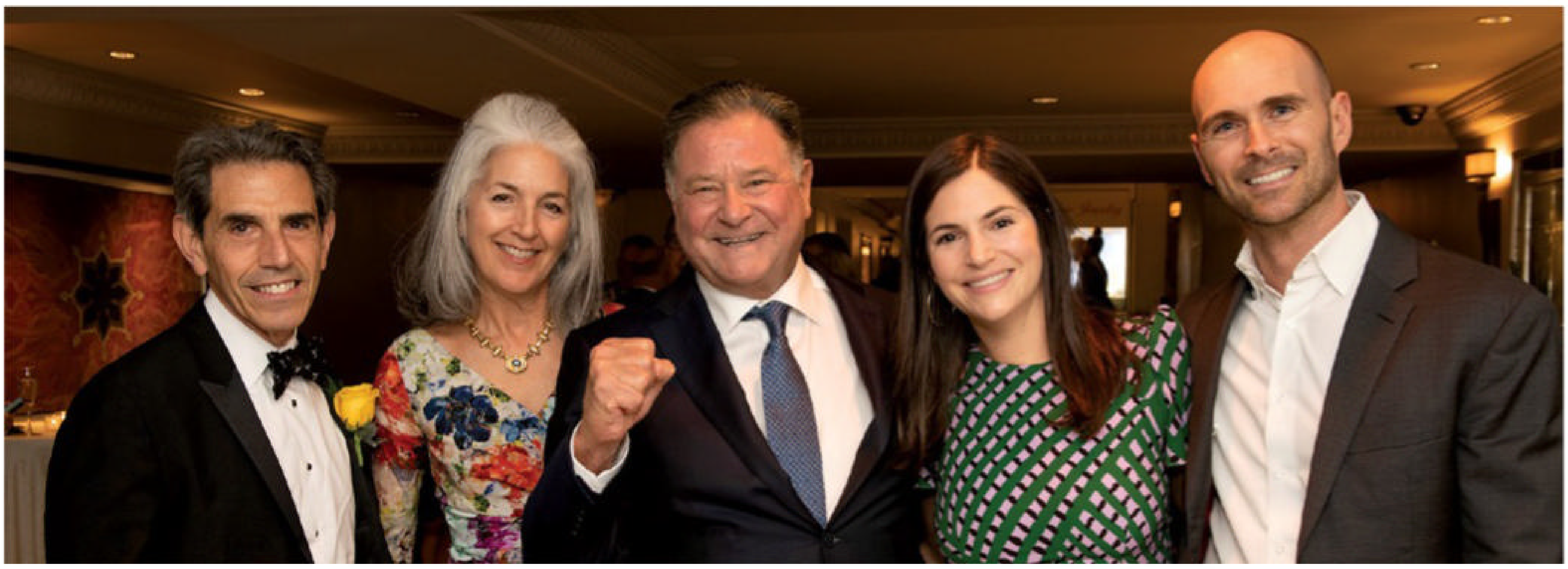
Gary Fisch of Gary's Wine & Marketplace and Robert Harmelin of Allied Beverage Group.

John Hayes of Brown-Forman, Mike Keyes of Proximo Spirits, and David Dearie of Ste. Michelle Wine Estates.

Mat Dinsmore of Wilbur's Total Beverage, Nancy Dinsmore, and Dennis Dinsmore of Wyatt's Wet Goods.

John Meisler and Scott Ware of Serralles USA.



Gary Fisch of Gary's Wine & Marketplace and Kim Leonard, Stew Leonard, Blake Leonard, and Edouard Leonard of Stew Leonard's Wines & Spirits.

Jeffrey Altschuler (center) of Allied Beverage Group and Sasha and Gary Vaynerchuk of Wine Library.

Eddie Block and Marc Sachs of Republic National Distributing Co.

Ann Mukherjee and Vincent Turpin of Pernod Ricard USA.

Carlo Coppola and David Turo of Beam Suntory.

Deena Kreston, Bob Kreston, and Jeff Kreston of Kreston Wine & Spirits and David Marberger, Lisa Marberger, Beverly Ferrar, and Chuck Ferrar of Bay Ridge Wine & Spirits.

Peggy Perry of Willow Park Wines and Wayne Henuset of El Tequileno Tequila.

Marques Warren of Downtown Spirits, Deena Kreston of Kreston Wine & Spirits, and Mat Dinsmore of Wilbur's Total Beverage.

John Rydman (left) and Lindy Rydman (second from right) of Spec's Wines, Spirits & Finer Foods, and Tom Cole (second from left) and Bob Hendrickson of Republic National Distributing Co.

Chad Sokol of Costco Wholesale Corp. and Lucy Sokol.

Tim Burke and Pete Angus of Tito's Handmade Vodka with Wayne Chaplin of Southern Glazer's Wine & Spirits

Jason Connelly and Andy England of Phillips Distilling Co.

John Roa, Robert Funiss-Roe, and Juan Rovira of Samson & Surrey.

Joe Fortune and Mike Rudy of Mast-Jägermeister US.

The Delicato Family Wines legacy began when Gaspare Indelicato began planting grapes in Manteca, California in 1924. Now, the family-run company's portfolio includes wineries from all over California, including Black Stallion Estate Winery (pictured), and around the globe.

Delicato: A Company On The Move

After three generations in business, Delicato Family Wines is not slowing down

BY CAROL WARD

PHOTOGRAPHS BY PAIGE GREEN

Tony Indelicato used to advise his sons with one simple adage: if you're not growing in the wine industry, you're going backwards. Brothers Jay and Chris, along with their cousins, have taken the words to heart. The third generation of Indelicato family members have been running Delicato Family Wines for roughly the past two decades, and in that time the company has become one of the top 5 branded wine suppliers in the United States.

That position was reinforced earlier this year with the acquisition of Francis Ford Coppola Winery, which significantly bolstered Delicato's premium portfolio. The deal adds more than a million cases of volume to Delicato's total, including Coppola's Diamond Collection, retailing in the fast-growing $20 range. Impact Databank estimates that, including Coppola, Delicato's volume was up 26% to 17 million cases last year, on a pro forma basis.

President and CEO Chris Indelicato says the brand is an excellent fit in Delicato's growing portfolio. "It gives us a top three super-premium brand," he says. "It gives us tremendous North Coast wine-making facilities with three million cases of production capacity. The Sophia brand gives us cans and sparkling wine. Those are all really nice categories that we hadn't been participating in, up to this point."

"For years we've been producing wines from grapes out of the North Coast, out of Sonoma and the surrounding growing

Delicato Family Wines is now in the hands of its third generation of Indelicatos. Brothers Chris (left), who is President CEO, and Jay (right) who is COO, run the company alongside four of their cousins: Marie Indelicato Mathews, Frank Indelicato, Cheryl Indelicato, and Mike Indelicato.

areas," says Chris's brother, COO Jay Indelicato, noting that because Delicato lacked production in the area, grapes were shipped to one of its wineries outside the region or processed by a third party. "With this acquisition, we not only have a footprint, but we've got a couple of great facilities. We're super happy to get that footprint, and so are our growers."

Francis Ford Coppola holds an equity stake in the company, and has joined the company board. Chris Indelicato says the energy from someone like Coppola, of an earlier generation, is motivational. "That generation is just extraordinarily optimistic and they have no fear of failure," he says. "I think it's infectious to have that in the organization. It gives people swagger, it motivates them."

"His creativity, experience, optimism, and fearlessness are all a great balance to have back in the business," Chris adds. "We miss that from my dad and two uncles, so it's great to have [Coppola] as part of the company moving forward."

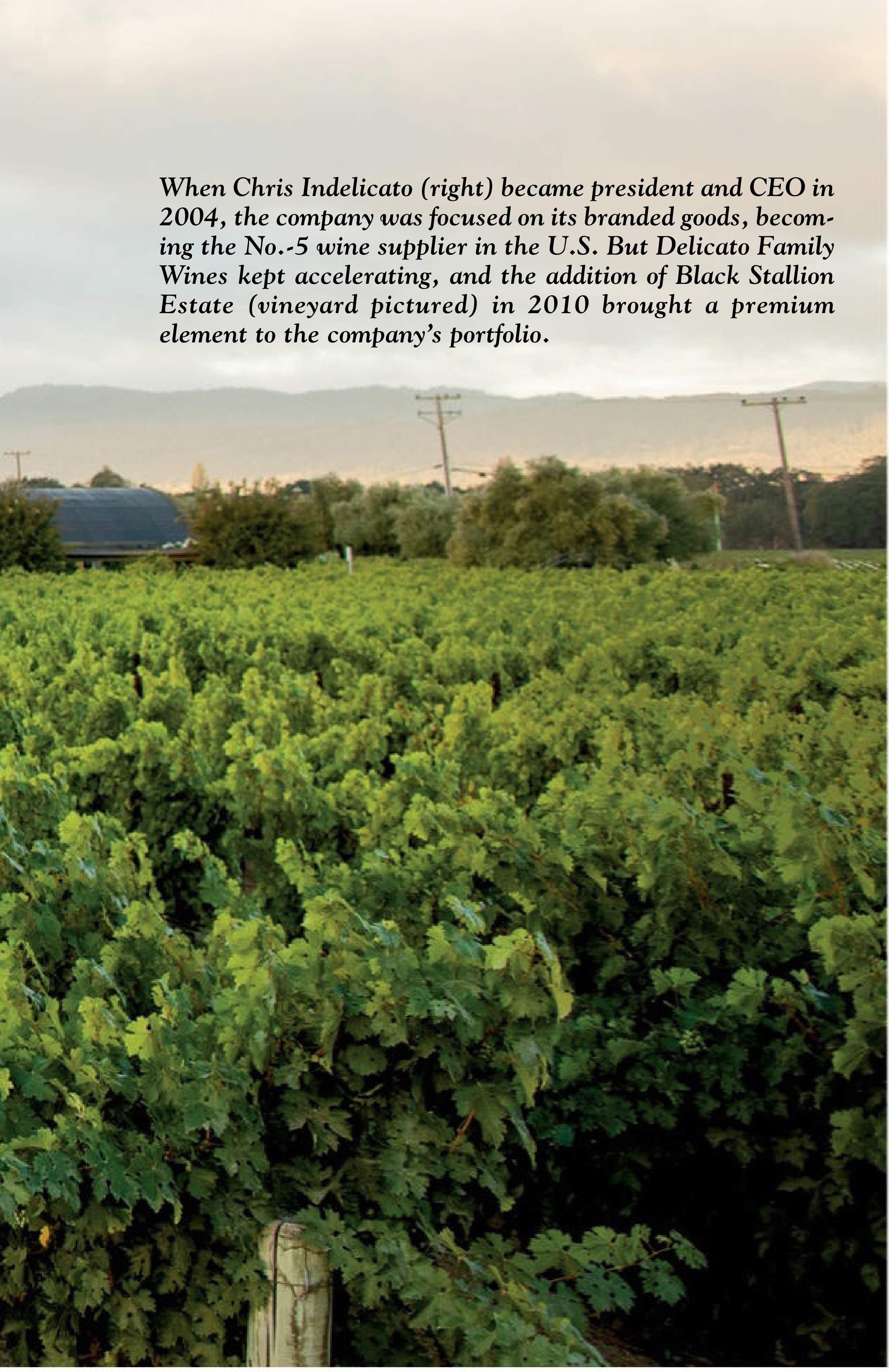
The Family Factor

Chris' "Dad and two uncles" are Tony, Vince, and Frank Indelicato, the sons of Gasparé Indelicato, who planted the first Delicato vineyard in Manteca, California in 1924. The winery was launched in the 1930s.

"The three of them grew up on the farm making wine," says Chris Indelicato. "The business really took off in 1968. We began making wine for Almaden back in the day, and really, for most of the rest of the century, up until around 2000, we were considered the winemaker's wine maker. We were making bulk wine for a large number of very successful brands throughout the '70s, '80s, and '90s."

There are currently six third-generation family members directly involved in the business. Along with Jay and Chris Indelicato, four cousins play an active role. Marie Indelicato Mathews is director of hospitality and retail, Frank Indelicato is transportation lead, Cheryl Indelicato is the family ambassador and spokesperson, and Mike Indelicato is involved in customer service.

As with many family businesses, all started early in learning the ropes. "All of us as kids worked at the winery from age ten through around 18, before we went to college," says Chris. "It was a great experience because we got to work in all areas of the business. We started out in the vineyards. Then we



When Chris Indelicato (right) became president and CEO in 2004, the company was focused on its branded goods, becoming the No.-5 wine supplier in the U.S. But Delicato Family Wines kept accelerating, and the addition of Black Stallion Estate (vineyard pictured) in 2010 brought a premium element to the company's portfolio.

> "All of us as kids worked at the winery, it was a great experience because we got to work in all areas of the business."

came back and worked in maintenance bottling. I spent years in the tasting room, getting to see a little bit of what the original, early years of DTC look like. It was just an excellent experience to essentially work in just about every job throughout the winery.

"Our family began succession planning at a very early age," he continues. "We had to go work after we got our college degree, and we had to work a minimum of five years for another company outside of the family business. All of us did different jobs along the way. I became a CPA. My brother was an electrical engineer, one of our cousins is a nurse, another cousin had a Hallmark Gold Crown store."

"It was a different path for everybody, on their own time," notes Jay. "The other thing was when you came back, there actually had to be a job opening for you and you had to be qualified for it."

Jay says he returned to the family firm in the late 1980s when, "there really wasn't that much going on, frankly." He thought he'd be back for a few years before "going to find something better and more interesting to do. Here we are 30-something years later and I'm still here," he says.

The company focus began to shift in the early 2000s. "Around 2000, the folks decided to retire," Chris says. "The second generation had a non-family CEO come in to mentor our generation for a bit. In the early 2000s, we began to focus on the branded case goods business." Those brands resonated with consumers, accelerating the growth that would lead Delicato to becoming the No.-5 wine supplier in the U.S.

Growth and Innovation

The workhorse in the Delicato portfolio is undeniably Bota Box. Launched in 2003, the brand simmered for years, reaching 1 million 9-liter cases in 2010. A decade later, Bota Box depleted 11.3 million cases—a 41.2% increase over 2019. Bota Box accounts for more than two-thirds of total Delicato portfolio volume. "The Bota franchise is one of the top priority brands that we have," notes Delicato's executive vice president of marketing Jon Guggino. "Bota consists of Bota Box, Nighthawk, and our newly introduced Bota Breeze, which competes in the better-for-you segment as a low-calorie, low-carb, and low-alcohol brand that we're having really nice success with so far."

18+

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RELAX
RIESLING
NOBLE VINES
337
BOTA BOX
1924
120
BOTA BOX Breeze
MERCER BROS.

Today, the Delicato Family Wines portfolio (lineup pictured) is global, though its focus remains on its home state of California. Global labels include Santa Rita and Scarlet Vines from Chile; Stoneleigh and Escarpment from New Zealand; and Relax and Franz Keller from Germany. Outside California in the U.S., Washington and Oregon are represented in the DFW portfolio.

PHOTO COURTESY OF DELICATO

Delicato added a premium element to its portfolio in 2010 with the acquisition of Black Stallion Estate, a Napa property. In 2017 the company acquired Alba Coast Winery, and a year later expanded through agency agreements with wineries in Chile and Germany. The company has also had several internal wine brand launches over the past decade, including 1924, Three Finger Jack, and Diora.

DELICATO FAMILY WINES KEY BRANDS

BRAND	ORIGIN
Santa Rita	Chile
Pool House	California
Gnarly Head	California
Schmitt Söhne	Germany
Rosso & Bianco	California
Wine by Joe	Oregon
Votre Sante	California
Scarlet Vine	Chile
Stoneleigh	New Zealand
Three Finger Jack	California
Virginia Dare	California
Bota Box	California
Gia	California
Franz Keller VDP	Germany
Archimedes	California
Santa Rita	Chile
Noble Vines	California
1924	California
Francis Coppola Diamond Collection	California
Relax	Germany
Z. Alexander Brown	California
Mercer Bros	Washington
Director's Cut	Sonoma
Black Stallion	California
Diora	California
Torbreck	Australia
Friedrich Wilhelm Gymnasium	Germany
Schloss Vollrads	Germany
Dobbes	Oregon
Bischöfliche Weingüter Trier	Germany
Escarpment	New Zealand
Coppola Prestige	California

Much of the activity points to premiumization, and the addition of Coppola's Diamond Collection underscores that effort. "The Coppola Diamond Collection is a very meaningful piece of business for us on the glass side of the business, especially in that $11-and-above level," Guggino says. "We're really excited to have that as part of our brand stable as well, and really motivated to hit the ground running on that brand and make sure that we unlock future growth on it as well."

Coppola's Diamond Collection, the largest brand in the Coppola stable, increased 10% to 1.1 million cases in the U.S. last year, according to Impact Databank. Other brands include Director's Cut, a luxury label; Sofia sparkling wine, which is also available in cans; Pool House, a new line of low calorie, low carb, low alcohol wines; and other labels. "We're incredibly excited and we have a lot of plans in place for those businesses, which we cherish and which, quite frankly, are a privilege and honor to be taking on," says Guggino. "It's a stable of brands that has a legitimate and rich heritage and story behind it. As a marketer, that's extreme and we really want to embellish and capitalize on that."

The Director's Cut will be added to the Transcendent Wine sales division, which was formed in 2019 to focus specifically on wines priced above about $20 a bottle. The formation came two years after Delicato took a significant stake in V2 Wine Group. Director's Cut will join a division that includes Black Stallion Limited Release, Diora Wines, Torbreck, Escarpment, Stoneleigh, Casa Real, Triple C, Schloss Vollrads, Franz Keller, and others.

The separate Delicato Wines portfolio houses Bota Box, Noble Vines, Gnarly Head, Z. Alexander Brown, Black Stallion, 1924, Three Finger Jack, Toad Hollow, Mercer Family Wines, Relax Riesling, Twisted, Domino, Irony, Santa Rita, Funf, Schmitt Sohne, and Thomas Schmitt.

Beefing Up Production

Total company volume has grown dramatically over the past decade, from just under 4 million cases in 2010 to about 16 million

DELICATO FAMILY WINES—LEADING BRANDS IN THE U.S., PRO FORMA
(thousands of 9-liter case depletions)

Brand	2010	2015	2019	2020	Average Annual Compound Growth Rate 2010-2015	Average Annual Compound Growth Rate 2015-2020	Percent Change 2019-2020
Bota Box	940	3,863	8,004	11,302	32.7%	15.7%	41.2%
Diamond Collection	770	1,000	1,000	1,100	5.4	1.9	10.0%
Noble Vines	150	549	635	615	29.6	2.3	-3.1%
Z Alexander Brown	-	-	185	212	-	+	14.6%
1924	-	-	140	189	-	+	35.0%
Black Stallion	-	41	88	89	+	16.8	1.1%
Three Finger Jack	-	-	25	50	-	+	100.0%
Total Leading Brands	**1,860**	**5,453**	**10,077**	**13,557**	**24.0%**	**13.1%**	**34.5%**

Source: IMPACT DATABANK ©2021

BUCHER
vaslin
Delta Oscillys

To increase production capacity (production at Black Stallion Estate pictured), Delicato Family Wines recently invested $100 million in a state-of-the-art facility that includes 11 different packaging lines and two luxury storage spaces.

cases in 2020, and registered double-digit growth in each of the past ten years, the company says. While some of that volume came from agency brands and acquisitions, the company's owned brands have grown exponentially—especially Bota Box.

Bota Box reached 1 million cases in 2010. A decade later, the brand depleted 11.3 million cases, more than two-thirds of Delicato's portfolio volume.

Delicato Family Wines recently invested $100 million in a state-of-the-art production facility with 20 million case capacity. The facility includes 11 different lines consisting of two glass lines, five bag-in-box lines, one Tetra line, and four flexible configuration lines. It also includes luxury storage spaces.

"That capacity was super important, and it came on just before the 2020 pandemic," says Jay. "It was crucial to keeping up with demand. As it was, it was touch and go the whole way." He says the new facility increases efficiencies and allows for ample space for employees to work in a streamlined fashion, especially during the pandemic when social distancing is necessary.

The Coppola acquisition gives Delicato additional production capacity, including some new options. "They have a canning line, which is something we didn't have, and it's a great fit. And they also have a sparkling line, which we didn't have," Jay notes. The addition of those lines, and the flexible configuration lines in Delicato's newly built facility, will allow the company to stay ahead of wine industry packaging trends.

"I think we're one of the leaders in alternative packaging," says Chris, noting the boxed and TetraPak offerings in various sizes for Bota Box. He sees opportunity with canned wine now that the company has a dedicated canning line—the Sophia

DELICATO FAMILY WINES: A TIMELINE

1912 – Gaspare Delicato arrives in the USA

Gaspare Indelicato (1894-1960) emigrates to California from the village of Campobello, Sicily, arriving at Ellis Island. While most Sicilians settled on the East Coast, Gaspare's dream was to come to California. He initially worked as a coal miner in Pennsylvania before travelling west to Washington, where he worked making bricks in Clay City, to support the industrial boom of the early 1900's. When the Depression hit, he moved to California to work on the Hetch Hetchy Dam project, and then moved to Lodi, CA where he worked in the vineyards. There he met Sebastiano Luppino, another Silician, and married Sebastiano's sister-in-law, Caterina. Gaspare's family had been growing grapes back in Italy for generations, and he followed in their footsteps.

1924 – Gaspare plants his first grapes

Sebastiano and Gaspare buy an old dairy farm in Manteca in the agriculturally rich San Joaquin Valley, 75 miles southeast of San Francisco, buying the 68-acre property with borrowed money to cultivate food for their families and earn a living by farming. Among those crops were Carignane, Zinfandel, and Mission grapes. They were used for home-made wine, but the excess was sold to home winemakers around Chicago.

1935 – Gaspare makes his first wines (sold in bulk to other wineries)

After Prohibition ended in 1933, selling grapes to home winemakers was no longer profitable. Most of the farmers of the other small vineyards around Gaspare and Sebastiano's property plowed under their vines and planted something else or just left. Gaspare and Sebastiano decided the only way to salvage the grape crop was to make wine. They applied for winemaking permits in 1934, and in May 1935 proudly opened their first winery in a converted hay barn, using a small hand-crusher, a hand-operated winepress and a few old vats they had bought from neighbors. They called the winery the Sam-Jasper winery (bonded winery No. 4094)—named after the Americanized versions of their (Sebastiano and Gaspare) names. Their first vintage of wine was 3,451 gallons (3,500 cases), sold to family and friends, and eventually to other winemakers. The winery grew slowly steadily. During World War II, wine was scarce and prices rose. The winery was profitable, and Gaspare's reputation grew as other wineries approached him to make custom-made wines. The family acquired more vineyards to make enough wine and the business grew.

1950 – Gaspare's sons join the wine business

Gaspare's 3 sons, Vincent, Frank and Anthony, joined the family winery in the early 50's as the business grew. Tony was the winemaker, Vince was selling on the road, and Frank was the cellar manager. The 3 brothers gradually took over the family business (1950-1958).

1960 – Gaspare and his sons buy out Sebastiano's share of the Sam-Jasper winery

1968 – The Indelicatos begin custom winemaking

1970s – Delicato Vineyards is born

Vince, Frank and Anthony form a corporation and renamed the Sam Jasper winery Delicato Vineyards. New buildings are dedicated in 1975 and 1983 on the property.

1981 – The 3rd generation starts working at the winery

Chris and Jay Indelicato join the family business.

1988 – Delicato buys San Bernabe vineyard

In the late 1980's, the family recognizes that the industry is moving away from generic low-priced wine to premium-priced varietal wines. As part of the premium shift, Delicato buys 13,148 acres of San Bernabe vineyard in Monterey County. At the time the vineyard produced more than a third of all the grapes growing in Monterey County.

1995 – Delicato buys the Clay Station Vineyard (Lodi County), formerly the old Borden Ranch and develops it into 1,300 acres of premium vineyards

1996 – Delicato releases range of popular premium wines

2000 – Delicato enters the branded wine business

2003 – Introduces Bota Box

2004 – Delicato names Chris Indelicato CEO

San Bernabe becomes an AVA, with Delicato's vineyard taking up half the AVA.

2006 – Launches Noble Vines, as well as Irony (first Napa wine, also Russian River and Monterey)

2007 – Launches Twisted wines

2010 – Delicato purchases Black Stallion Winery and Bota Box reaches 1 million cases

2013 – Launches Sequin Delicately Bubbled wines. Delicato is ranked a Top Ten branded winery

2014 – Launches Belle Ambiance wines.

2016 – Delicato acquires Santa Lucia Highlands vineyard, as Bota Box reaches 5 million cases

2017 – Forms partnership with V2, and purchases Alba Coast Winery

Won award for Best USA Wine Producer 2017 by International Wines and Spirits

2018 – Forms partnership with Mercer Vineyards

Delicato also starts importing Santa Rita wines

2019 – Becomes the U.S. importer and distributor for Schmitt Söhne Family Wines. Launches Transcendent Fine Wine Division

2020 – Bota Box reaches 10 million Cases, and Delicato launches Stoneleigh Brand in the U.S.

2021 – Delicato acquires Francis Ford Coppola Winery

> “[The Coppola acquisition] gives us a top three super-premium brand,”
> —*Chris Indelicato, CEO*

Delicato Family Wines acquired Francis Ford Coppola wines (winery top; gate above) earlier this year. The acquisition, Chris Indelicato says, provides DFW with a second “must-have” brand in the Coppola Diamond Collection, which grew 10% in 2020 to 1.1 million cases.

PHOTOS COURTESY OF DELICATO

brand in the Coppola portfolio has a canned option. “There may be other opportunities within some of our existing brands now, given the capacity we have,” he says. “The 250-ml. can, in my opinion, is going to be the long-term winner.”

Portfolio Push

While the Delicato team is integrating the Coppola portfolio of brands, they’re also seeking future opportunities. The Coppola purchase gave Delicato a second “must-have” brand, according to Chris. He wants three.

“Must-have” brands, for Chris, are brands that are among the top two or three brands in a wine category that is growing. Bota Box, as a dominant force in the Delicato portfolio and in the overall boxed wine category, is a clear “must have,” according to Chris. The Coppola Diamond Collection, as a leading and growing brand in the super-premium sector, represents the second.

“There are plenty of solid categories out there, and some of the even bigger players play in more of those, but for us, I think the opportunity over the next couple of years is to grab a third brand, a must-have brand in a category,” Chris adds.

“We have five top 100 brands now with the addition of Coppola,” he continues. “And I think organic growth is critical to keeping the portfolio healthy. But I also think that we would like to expand our offerings with a third must-have brand in the U.S. market. There aren’t a lot of those out there, but we’re patient, we talk to people all the time and we’re continuing to look for an additional acquisition at some point.”

Chris envisions a portfolio with fewer but bigger brands—ones that can grow into category leaders. He says the company is willing to put the investment in to make that happen.

“I’m not a believer in growing the volume and then hiring the resources to maintain the volume,” he says. “I don’t think you really ever get there. It’s the same on the winemaking side—we always have more production capabilities and technology that we’re working on that’s ahead of the curve. I just don’t think it’s safe in the wine industry to have a status quo strategy.”

That strategy also means shedding brands that are under-performing. “We’ve been doing that for the last couple years, and there’s more to come,” Chris says.

Portfolio shifts will also extend to agency brands in the future, with Chris eager to beef up that part of the business. “We’ve got some great agency brands that we brought in and that’s allowed us to have some category leaders, particularly with our German portfolio, and we have the No.-2 Chilean wine,” Chris says. “It’s good for us to expand our offerings because I think in a consolidating market, the retailers and distributors are going to look for suppliers that can provide a more comprehensive book.”

Wines from other countries will likely be added to the roster in the future, Chris says. He also has an eye on small luxury producers within the U.S. “As the market consolidates, maybe some of the smaller suppliers, some really high-end heirloom type brands could use the distribution scale and scope that we have out in the market, while they focus on the wine quality, and the brand and marketing imaging.”

All that activity will likely push Delicato up the rankings of wine companies in the U.S. from its current No.-5 ranking. “If we add a third must-have brand, I would imagine that we would move up a step or two over the next five to ten years.”

Executive vice president of marketing Jon Guggino (above) emphasizes the importance of the Bota Box franchise for DFW (barrels top left; tasting room left), noting that its recent Bota Breeze offshoot is doing very well.

DELICATO
WINE TASTING

The Next Generation

If Delicato's leadership has one eye firmly on future expansion, the other is on sustaining the family legacy for the next generation. Chris says it's one of four principles he focuses on when leading a family-owned business. "Being long-term players in the industry, you always have to leave things better than you found them," he says. "Everything we think of when we're making strategic decisions is in terms of years, whether that's five or ten years or more.

Chris also cites hard work, respect for the land and commitment to wine quality, and respect for employees, who are viewed as an extension of the family. He notes the deep pool of talent at the winery, some of whom have been involved for a decade or more. "A lot of the talented folks that we've been able to bring in starting in the early 2000s are still here and they've really [contributed] to the success we're having today," he says.

Chris, Jay, and their cousins represent the third generation of Indelicatos working in the business. Thus far, only one of the fourth generation is involved on a full-time basis. Stephen Mathews, son of Marie Indelicato Mathews and nephew of Chris and Jay, is a winemaker and enologist at Black Stallion Winery. The others—nine in total—are a bit younger, in their teens or early 20s. That means summers working in the family business, through internships or just lending a hand in doing whatever needs to be done.

Chris says the same rules that governed his generation's involvement in the business will apply to the fourth generation, including college and at least five years working outside the family business. "And I'd like to add my own," he adds. "I'd like them to get an MBA as well. I think they should go work somewhere for a few years, get an MBA and then go back and work for others. There's always plenty of time to come back to the family business. The more experience they have at an outside company, the better the chances are of them being really successful when they come back to Delicato."

PHOTO (BOTTOM LEFT) COURTESY OF DELICATO

Los Dos
BRUT ROSÉ
Los Dos
BRUT
Los Dos
CAVA
BRUT ROSÉ
Los Dos
BRUT
CAVA

Los Dos
SPARKLING SYNCHRONY
INTRODUCING CAVA BRUT & BRUT ROSÉ

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Bubbling

Sparkling wine has skyrocketed over the last decade, with imported offerings reaching 14 million cases and domestic brands hitting 11 million in 2020.

HALBERGMAN/GETTY IMAGES

Over

Following a decade of rapid growth, domestic and imported sparkling wine brands aren't slowing down

BY SHANE ENGLISH

Sparkling wine has boomed in the last decade, with consumers reaching for bottles across price tiers and from different countries more and more often. The category—ranging from high-end Champagne to affordable domestic brands—has added roughly 9 million cases since 2010, and major growth areas like Prosecco are continuing to see strong growth throughout the U.S. The top ten brands, including La Marca and Mionetto Proseccos, and domestics like Andre, Barefoot Bubbly, and Cook's, have nearly doubled in size over the last decade, rising from around 7.5 million cases to over 14 million cases. Brands at the longer end of the tail (and often at high prices) continue to grow as well, with America's leading Champagne brands, Veuve Clicquot and Moët & Chandon, rising alongside other strong contenders like Luc Belaire and Mumm Napa. Overall, imports eked out stronger gains in 2020, rising 3.7% to just under 14 million cases, while domestic releases grew by 1.5% to just over 11 million cases, according to Impact Databank.

"We've seen steady growth in sparkling wine consumption in the US over the last 20 years; a lot of Prosecco, more Cava, Champagne, and of course California sparkling wine," says Hugh Davies, president of Schramsberg Vineyards.

While the overall sparkling wine market rose, growth was not evenly distributed across price segments. Domestic sparklers performed best above $15 and below $10, with the workhorse brands sitting between declining slightly, by 0.2%. On the imported side, Italian brands priced between $10-$20 performed very well, with the majority of leading brands growing (and many at double-digit rates.) Though working from a much smaller base than Italian bubblies, French sparkling wine (excluding Champagne) led the way, growing by 48% and adding 180,000 cases, according to Impact Databank. But suppliers believe the category overall will continue growing.

"As sparkling moves from a special event or occasion choice to an everyday selection, more Americans will be looking to explore new varietals and types. They are going to look for both value and quality in their selection," says Brad Mayer, vice president of public relations and communications at

Thanks to its popularity both on- and off-premise, the affordably priced La Marca Prosecco (vineyards top; bottle above) is the No.-1 sparkling wine brand in the U.S., hitting 2.4 million cases in 2020.

Precept Wines, which markets the sparkling wine portfolio of New Mexico-based Gruet Winery.

Prosecco's Prowess

Italian sparkling wines between $10 and $20 are the second largest group of sparklers tracked by Impact Databank. Last year, the segment reached roughly 6.6 million cases, up 9.3%. Since 2010, this market segment has expanded by over 500%, adding over 5 million cases as consumers bring Prosecco home more and more often. Although Prosecco remains a healthy category and continues to grow its market share, the category didn't escape 2020 completely unscathed. Imports to the U.S. declined by 2.7% to 7.45 million cases last year, Prosecco's first decline in imports in a decade.

E. & J. Gallo's La Marca Prosecco was the largest sparkling wine brand in the U.S. for 2020, overtaking Cook's, a lower-priced domestic brand, by a wide margin. La Marca accelerated by 25% to reach 2.4 million cases, giving the brand a roughly 1.5 million case lead on the second-ranked Prosecco and a roughly 300,000 case lead among all sparkling wines. The brand has had a tremendous decade and is one of the leading examples of how quickly Prosecco swept the U.S. In 2010, La Marca was at just 50,000 cases and grew by over 800,000 cases in the first half of the decade before roughly tripling in size again between 2015 and 2020.

For the majority of the brand's life, its portfolio consisted of a single release—a Prosecco DOC-appellated wine—released in a variety of formats ranging from 187-ml. minis to 1.5-liter magnums. In 2018, La Marca entered the higher end of the category with Luminore, a DOCG Prosecco. The brand's latest release came last December when La Marca entered the new Prosecco rosé market.

La Marca, a hit in both in the on- and off-premise, is the most valuable sparkling wine brand in the U.S., outshining even the leading Champagne brand in the U.S., Veuve Clicquot, by around $100 million. If the current trends continue, La Marca will be with worth $500 million in the coming years. It's tremendous growth is reflected at retail where it's among the leading sparkling labels on e-commerce platforms like Drizly and Gopuff, and in brick-and mortar stores like west coast chain BevMo and Pennsylvania's Fine Wine & Good Spirits stores.

Behind La Marca's is Freixenet Mionetto USA's Mionetto Prosecco at 840,000 cases. The brand was flat last year, according to Impact Databank, as the company scrambled to build momentum in the off-premise amid the pandemic shutting down the on-premise for a large stretch of the year. "One thing we know is that during crises our sparkling wines, especially Prosecco, do well because it is at an everyday price," says Freixenet Mionetto USA CEO and president Enore Ceola. "In fact, in April, May, June, and then throughout the year, our business started to pick up, despite losing a good chunk of the on-premise. They were hurt, but the gains in the off-premise were more than enough to offset the losses."

Following Mionetto, the three brands that round out the top five Italian sparklers between $10-$20 feature wider portfolios of sparkling wine, branching out into Moscato d'Asti and Italian sparkling rosé from outside the Prosecco DOC. In third is The

For Freixenet Mionetto USA, 2020 was a mixed bag. Though still the No.-2 Cava in the U.S., the company's Segura Viudas label (winery left) declined by 10%. Its Mionetto Prosecco (winemaker Alessio del Savio right), the No.-2 Prosecco in the U.S., remained flat at 840,000 cases.

Wine Group's Cupcake sparkling portfolio (which beyond Italy, also markets a Spanish Cava.) The collection was up 16.7% last year to 700,000 cases, according to Impact Databank.

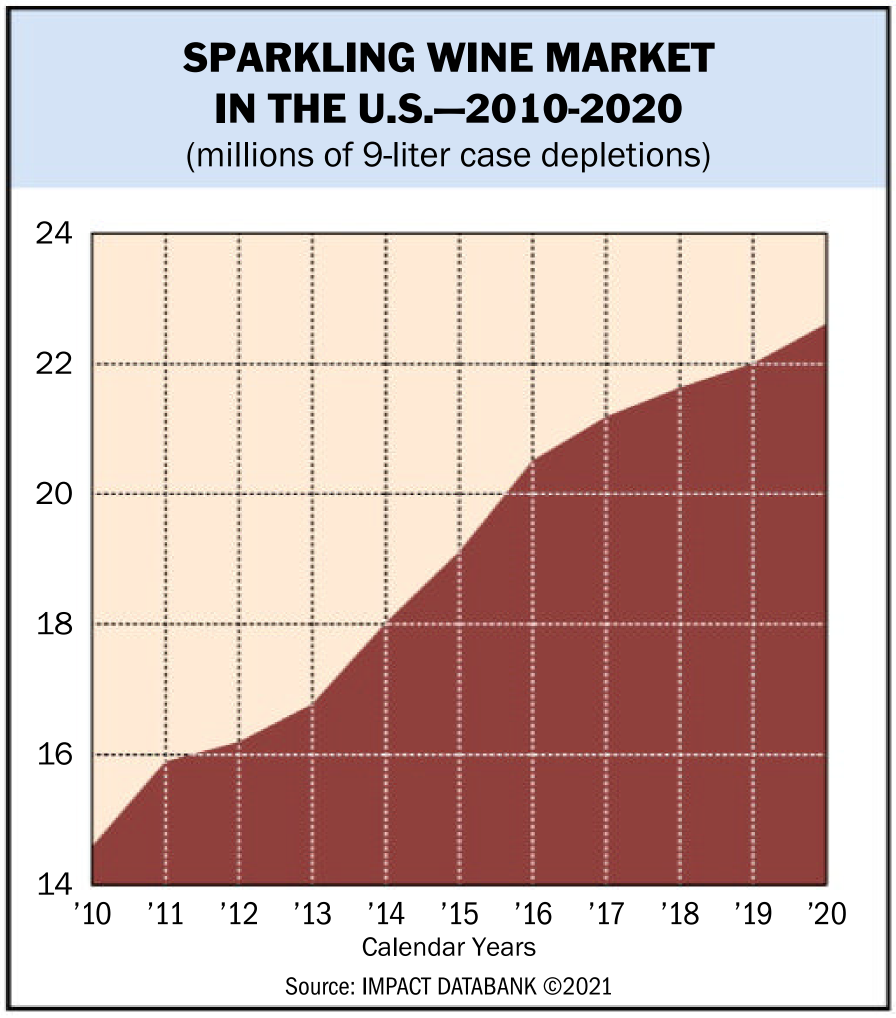
Bacardi USA's Martini & Rossi follows Cupcake and offers a different variety of sparkling wines to consumers. While the brand offers a Prosecco, its flagship release is Martini & Rossi Asti, a DOCG-appellated wine made from Moscato Bianco. The company also markets an Italian sparkling rosé. While the brand is currently below its 2010 depletions of nearly 600,000 cases, last year it was trending in the right direction, up 4.3% to 475,000 cases.

Rounding out the five leading brands is Prestige Beverage Group's Risata at 472,000 cases, up 13% last year. Risata, like Martini & Rossi, leads with Moscato-based wines, including the brand's flagship Moscato d'Asti and pink and red variants, alongside a Chardonnay-based sparkling rosé.

Outside the leading brands between $10 and $20, the Italian sparklers were more of a mixed bag, with four of the seven other leading brands growing. Constellation's Ruffino, 1821 Fine Wines & Spirits' Zonin, and Terlato's Riondo all struggled last year, dropping 0.5%, 24.9%, and 14.6%, respectively. Smaller brands in the segment that performed well include Palm Bay International's Lunetta Prosecco, which grew 4% to 310,000 cases; Enovation Brands' Gemma di Luna, which leaped 24.5% to 137,000 cases in its second year on the market; and Latitude Beverage Co.'s 90+ Cellars Lot 50 Prosecco, which increased 30.9% to 107,000 cases.

Riboli Family Wine Estates' Stella Rosa sparkling portfolio—covering a wide range of semi-sweet and sweet sparkling wines like Brachetto d'Acqui, Stella Rosa Imperiale Moscato and Black Lux, among others—also grew last year. Though only a small part of Stella Rosa's massive 5.25 million case empire, the brand's sparkling portfolio was up 20.6% to roughly 146,000 cases. "We had this big wave of momentum that was occurring, and by continuing our innovative marketing campaigns during the pandemic, we made the consumer even more aware that Stella Rosa is a low-abv, easy-to-drink wine from Piemonte, Italy," says president Steve Riboli. "And we are looking forward to another really good year with a target growth of 30% for 2021."

Interest in Italian sparklers is also growing in the $10 and under price tier, with two brands—both from Carriage House Imports—tracked by Impact Databank. The larger brand, Original Verdi, was up 1% to 1.45 million cases is joined by Sparkletini, at 874,000 cases, up 4%. Taken together, the two brands offer a variety of low alcohol wines in a variety of flavors, from the more traditional Verdi Spumante release to Sparkletini's portfolio of fruit-flavored sparklers.



SPARKLING WINE MARKET IN THE U.S.—2010-2020

(millions of 9-liter case depletions)

Source: IMPACT DATABANK ©2021

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Grand
WITH GRAND MARNIER
CUVÉE LOUIS-ALEXANDRE
Grand Marnier
CUVÉE
LOUIS-ALEXANDRE
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TOP 20 SPARKLING WINE BRANDS IN THE U.S.

(thousands of 9-liter cases)

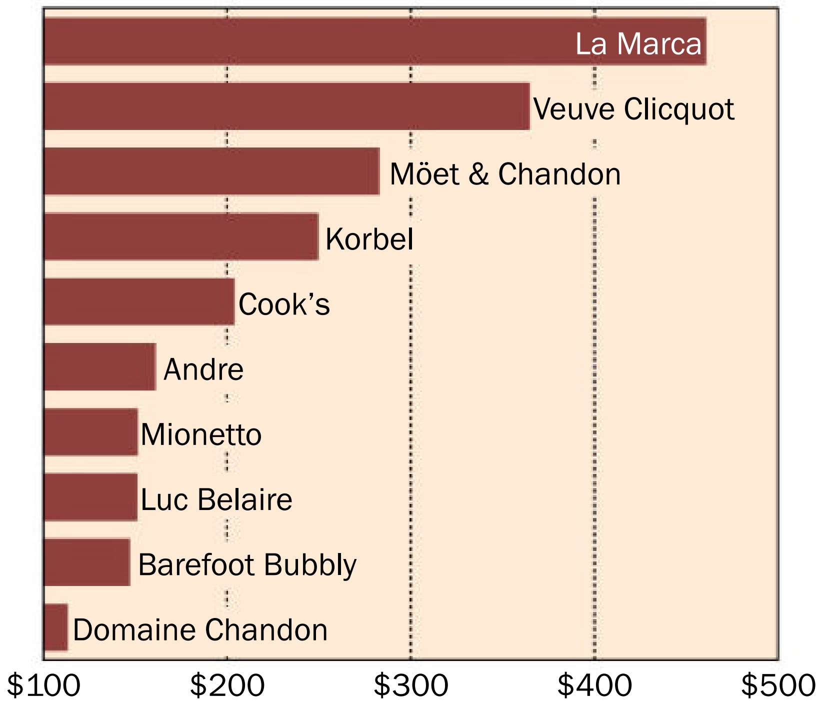
Rank	Brand	Company	Origin	2010	2015	2019	2020	Percent Change[1] 2019-2020
1	La Marca	E. & J. Gallo Winery	Italy	50	885	1,920	2,400	25.0%
2	Cook's	Constellation Brands	California	1,625	1,845	1,889	2,124	12.4
3	Andre	E. & J. Gallo Winery	California	1,710	1,685	1,725	1,940	12.5
4	Korbel	Brown-Forman Beverages Worldwide	California	1,285	1,425	1,435	1,491	3.9
5	Original Verdi	Carriage House Imports	Italy	1,125	1,361	1,432	1,446	1.0
6	Barefoot Bubbly	E. & J. Gallo Winery	California	600	1,150	1,150	1,230	7.0
7	William Wycliff	E. & J. Gallo Winery	California	465	675	1,220	1,190	-2.5
8	Sparkletini	Carriage House Imports	Italy	345	625	841	874	4.0
9	Mionetto	Freixenet Mionetto USA	Italy	265	550	840	840	-
10	Cupcake	The Wine Group	Italy	-	530	600	700	16.7
	Total Top 10			**7,470**	**10,731**	**13,052**	**14,235**	**9.1**
11	J. Roget	Constellation Brands	New York	615	850	930	578	-37.9
12	Freixenet	Freixenet Mionetto USA	Spain	545	557	559	559	-
13	Veuve Clicquot	Moët Hennessy USA (LVMH)	France	365	454	539	548	1.6
14	Domaine Chandon	Moët Hennessy USA (LVMH)	California	350	445	486	498	2.5
15	Martini & Rossi	Bacardi USA	Italy	594	517	456	475	4.3
16	Risata	Prestige Wine & Spirits Group	Italy	36	352	418	472	13.0
17	Moët & Chandon[2]	Moët Hennessy USA (LVMH)	France	406	383	434	462	6.4
18	Ruffino	Constellation Brands	Italy	-	245	448	446	-0.5
19	Zonin	1821 Fine Wines & Spirits	Italy	56	355	571	429	-24.9
20	Luc Belaire	Sovereign Brands	France	-	20	189	429	+
	Total Top 20[3]			**10,437**	**14,909**	**18,082**	**19,132**	**5.8%**

[1] Based on unrounded data
[2] Excludes Dom Perignon
[3] Addition of columns may not agree due to rounding

Source: IMPACT DATABANK ©2021

TOP TEN SPARKLING WINE BRANDS IN THE U.S. BY 2020 RETAIL VALUE

(millions of dollars)



Source: IMPACT DATABANK ©2021

Champagne's Ups And Downs

While imported sparklers, especially Prosecco, took the lead last year, many of America's best-selling Champagne brands continued to shine, with three leading brands—No.-1 ranked Veuve Clicquot (13th overall among sparkling wines), No.-2 Moët & Chandon (17th overall), and No.-4 Laurent-Perrier—growing, helping to offset the overall decline in the category. For Champagne overall, however, last year was a struggle, with the overall category dropping 2.5% to under 1.5 million cases. Last year's struggles appear to be a blip as the category has rebounded well in 2021 with shipments from France accelerating.

"We saw a rapid rebound in sales toward the end of 2020 and early 2021, and we're still experiencing growth as consumers continue to enjoy Champagne at home while exploring on-premise purchasing opportunities as well," notes Moët Hennessy's vice president of Moët & Chandon and Veuve Cliquot Anne-Sophie Stock. "We're optimistic that our numbers will continue to increase as the world opens up and people are finding more and more cause to celebrate."

Even for brands that have faced uncertainty in the last few years, the development and growth of e-commerce has presented new opportunities. For example, Ste Michelle Wine Estates' Nicolas Feuillatte, which was at 43,000 cases for 2020, has

CAVAS
FREIXENET

BELAIRE GOLD
BELAIRE ROSÉ
BELAIRE LUXE
BELAIRE ROSÉ

heavily pivoted toward marketing its Champagne on Instacart, Drizly, and Wine.com, aiming to greet consumers as they continue to embrace online shopping.

Beyond Champagne, France has a few brands developing quite strongly from smaller bases, and two brands under $35 stand out in particular. First up is Sovereign Brands' Luc Belaire, a rosé-driven brand that more than doubled last year to 429,000 cases, according to Impact Databank. The Luc Belaire portfolio has five wines, plus a nightclub-focused light-up bottling, with its flagship rosé sourced from France's Provence-Alpes-Côte d'Azur region and its Gold and Luxe releases made in Burgundy.

The other standout French sparkler is Barton & Guestier's Veuve du Vernay at 125,000 cases, down 32.5% for 2020. Though the brand faced a challenging year, Veuve du Vernay is still a young brand, having launched in the last decade and, despite the drop last year, maintaining a roughly 9% growth rate for the period of 2015-2020.

Though Italian and French sparkling wines largely weathered the changes forced by the pandemic, Spanish Cava priced between $10-$15 a bottle faced more challenging conditions with the overall market in decline. The largest Cava brand in the U.S., Freixenet, was flat at 559,000 cases according to Impact Databank.

Behind the leading Cava is another Freixenet Mionetto brand, Segura Viudas, which declined by nearly 10% to 224,000 cases. According to Ceola, Freixenet Mionetto USA has high hopes for the Cava portfolio for 2021 as the company is able to return to the on-premise and increase focus on introducing the brands to distributors and the public.

Impact Databank also kept tabs on two other Spanish sparklers that struggled in 2020. CIV USA-Garcia Carrion's Opera Prima Charmat declined to 190,000 cases in 2020, down from 279,000 in 2019. Though the brand did not easily weather the pandemic, the company has a bold prediction for 2021: 450,000 cases, driven by new formats and other new releases and the return of the on-premise. Cava brand Jaume Serra Cristalino was flat last year at 150,000 cases but is making a similarly big prediction as Opera Prima, projecting that the Cava brand will reach 250,000 cases for 2021.

Imported sparkling offerings beyond Italy were up and down. Luc Belaire (lineup top left) from France more than doubled, while Freixenet Cava (top right) remained flat. Domestic sparklers like Schramsberg Vineyards (riddling racks above), however, saw growth overall.

Domestic Growth

Among domestic sparkling wines, the strongest growth was concentrated among brands priced above $15 a bottle, though that segment is growing from the smallest base at 1.3 million cases (up 6% last year.) While the overall market was up, success was not evenly distributed for the leading brands with three of the seven in decline for 2020, averaging roughly a 10% drop. However, while some of the segment's brands struggled, the category's leaders all grew, driving the overall segment to lead the way among all domestic sparklers. Domestic sparklers above $15—especially the rosés—perform well in e-commerce channels like Gopuff and Drizly.

Moët Hennessy USA's Domaine Chandon neared the half-million case mark last year, up 1.5% to reach 498,000 cases. The California winery, the domestic younger sibling in the Moët and Chandon family, has posted slow and steady growth throughout the last decade and has maintained its place among the top brands in the U.S.

Holding strong roughly 100,000 cases behind Domaine Chandon is Pernod Ricard's Mumm Napa. The brand had a very strong 2020, up 15.5% rising above 400,000 cases. Over

PHOTOS BY (TOP LEFT) MIQUEL MONFORT SUBIRANA; (BOTTOM RIGHT) SCHRAMSBERG-VINEYARDS

California shines when it comes to domestic sparkling wine, with André (lineup top) from E. & J. Gallo leading the way. But offerings from beyond the Golden State are becoming popular, especially New Mexico's Gruet Winery (tasting room above).

PHOTO BY (TOP) JOEL OTTERSBACH

the last decade the brand has more than doubled in size and is a stalwart of the higher-end of American sparkling wine.

In third is one of the few domestic sparklers produced outside of California: Gruet. The New Mexico-sourced brand was up 15% last year to 219,000 cases, following just behind Mumm Napa as the two strongest sources of growth in the segment. "Our off-premise business grew double digits and we saw an increase in the brand's distribution as well," Precept's Mayer says. "In addition, our direct to consume business saw solid growth with more of our consumers ordering on line for either shipment or curbside pickup in Albuquerque and Santa Fe."

According to Mayer, the brand has seen an even stronger start to 2021, with the brand's off-premise trajectory continuing even as consumers return to bars and restaurants. "Gruet is having an exceptional start to 2021, with depletions up 24%. We've not only seen growth off premise but we are starting to see our on-premise business build back again as more restaurants and bars re-open," he says.

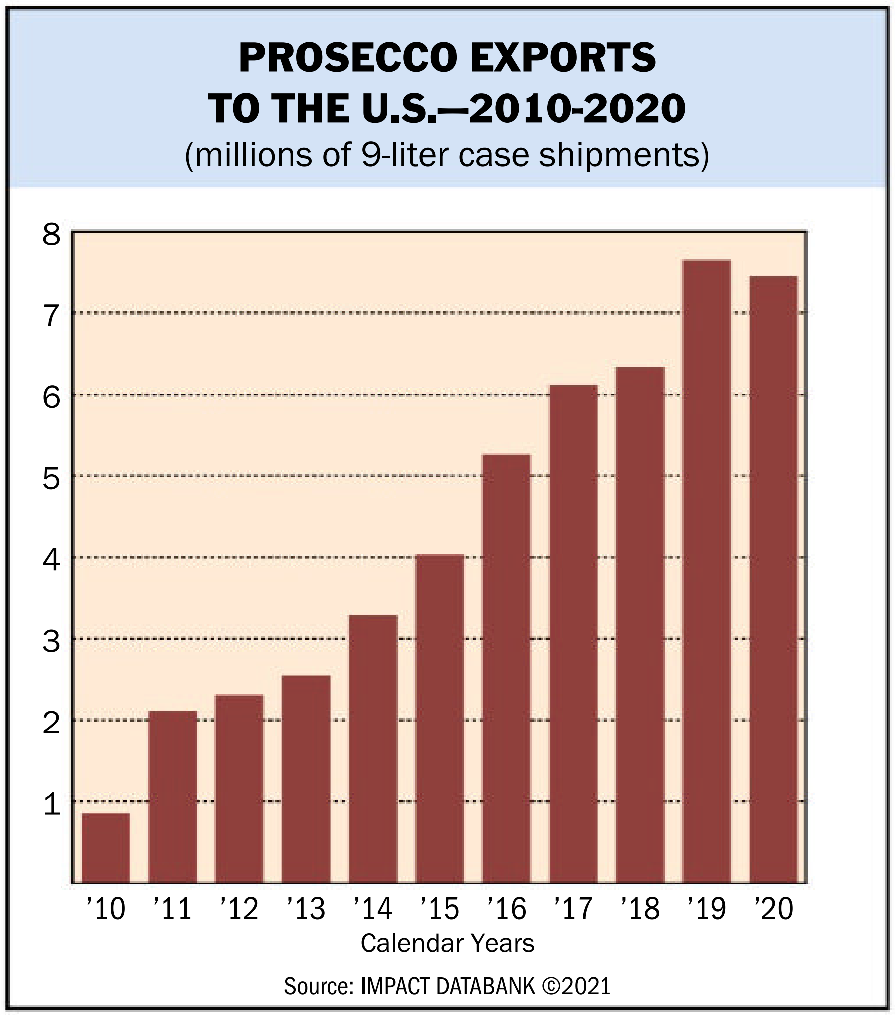
At the even higher end of American sparkling wine is California's Schramsberg, handled by Wilson Daniels. The brand grew by 3.8% to 83,000 cases. Rocco Lombardo, president of Wilson Daniels tells Impact that Schramsberg accelerated as the stay-at-home orders were issued last year.

"From June through December 2020 alone, our depletions of Schramsberg were up 22%, driven by the classic range of Blanc de Blancs, Blanc de Noirs, and Brut rosé," he says. He adds that the brand's strong off-premise performance was especially meaningful given that Schramsberg sells roughly 45% of its wines to the on-premise.

Through May, Schramsberg is up 35% with strong performance in New York, California, Texas, and Florida in both the on- and off-premise. "It feels like all our oars are in the water right now, and moving in a positive direction. Add in that the off-premise is still thriving, and visitor headcount and club shipment programs are rebounding and growing, the limiting factor to our growth could potentially be our inventory," says Davies.

The remaining sparklers priced above $15, faced more challenging conditions in 2020, with Roederer Estate, Gloria Ferrer, and Piper Sonoma all declining. Though Ferrer declined by 8.7% to 84,000 cases, Freixenet Mionetto's Ceola is confident that the brand can recover as consumers return to the on-premise and to the winery's tasting room in greater numbers.

As consumers traded up and brought more premium wines home during the pandemic, the middle of the domestic sparkling wine market—wines priced between $10 and $15—struggled to gain ground. Overall, the decline was slight, at 0.2% with the two largest brands in the segment holding their ground. Korbel, the category leader marketed by Brown-Forman, grew



PROSECCO EXPORTS TO THE U.S.—2010-2020

(millions of 9-liter case shipments)

Source: IMPACT DATABANK ©2021

U.S.—IMPORTED SPARKLING WINE MARKET BY TYPE

(millions of 9-liter case shipments)

Type	2010	2015	2016	2017	2018	2019	2020	Average Annual Compound Growth Rate		Percent Change[1]
								2010-2015	2015-2020	2019-2020
Prosecco	0.86	4.03	5.26	6.11	6.33	7.65	7.45	36.3%	13.1%	-2.7%
Champagne	1.41	1.71	1.82	1.92	1.98	2.14	1.74	3.9	0.3	-18.8
Cava	1.46	1.65	1.78	1.75	1.81	1.66	1.41	2.5	-3.1	-14.9
Other Imported	2.44	3.17	3.55	4.05	4.77	5.16	5.22	5.4	10.5	1.2
Total Imports[2]	**6.16**	**10.56**	**12.41**	**13.85**	**14.90**	**16.61**	**15.82**	**11.4%**	**8.4%**	**-4.8%**

[1] Based on unrounded data

[2] Addition of columns may not agree due to rounding

Source: IMPACT DATABANK ©2021

TOP EIGHT PROSECCO BRANDS IN THE U.S.

(thousands of 9-liter case depletions)

Rank	Brand	Importer	2005	2010	2015	2019	2020	Percent Change[2] 2019-2020
1	La Marca	E. & J. Gallo Winery	-	50	885	1,920	2,400	25.0%
2	Mionetto	Freixenet Mionetto USA	90	265	550	840	840	-
3	Cupcake[1]	The Wine Group	-	-	530	600	700	16.7
4	Ruffino	Constellation Brands	-	-	245	448	446	-0.5
5	Zonin[1]	1821 Fine Wines & Spirits	45	56	355	571	429	-24.9
6	Lunetta	Palm Bay International	-	103	253	298	310	4.0
7	Riondo	Terlato Wine Group	-	105	245	212	181	-14.6
8	90+ Cellars Lot 50	Latitude Beverage Co.	-	-	18	82	107	30.9
	Total Top Eight		**135**	**579**	**3,081**	**4,971**	**5,413**	**8.9%**

[1] Includes a small amount of other sparkling wine (not Prosecco)

[2] Based on unrounded data

Source: IMPACT DATABANK ©2021

by 3.9% to just under 1.5 million cases. Weibel Family Vineyards & Winery's namesake brand also grew by 4% to reach 275,000 cases. Below Weibel, however, the remaining two leading brands did not fare quite as well with Ste Michelle Wine Estates' Michelle and Pernod Ricard's Kenwood Yulupa down by 19.7% and 57%, respectively.

The entry level of the domestic sparkling wine category, on the other hand, held steady with the segment advancing by 2%. Three of the six leading brands posted growth, with one flat, and two in decline. Constellation's Cook's, which is the second largest sparkler overall, grew by 12.4% to 2.1 million brands. The company also owns J. Roget, which dropped by nearly 38%, ceding roughly 350,000 cases. The remaining brands priced under $10 are all owned by E. & J. Gallo. André was up 12.5% to 1.94 million cases, and Barefoot Bubbly was up 7% to 1.2 million cases. Gallo's only brand in decline in this segment is William Wycliff, which dropped 2.5% to just under 1.2 million cases. While these brands are outside of the price tiers that see the most exciting growth, their affordability and familiarity likely made them appealing options to price-conscious consumers during a year that for many was marked by financial uncertainty and unemployment.

KORBEL WINERY

Though value brands are losing favor because of premiumization, Brown-Forman's Korbel (winery pictured) remains a force in the sparkling wine category, reaching just under 1.5 million cases in 2020.

Despite a year with fewer big celebrations, Americans continued to flock to sparkling wine at growing rates, a trend marketers interpret as a sign that bubbly wines are somewhat shedding their celebratory image and are earning a place on more everyday tables.

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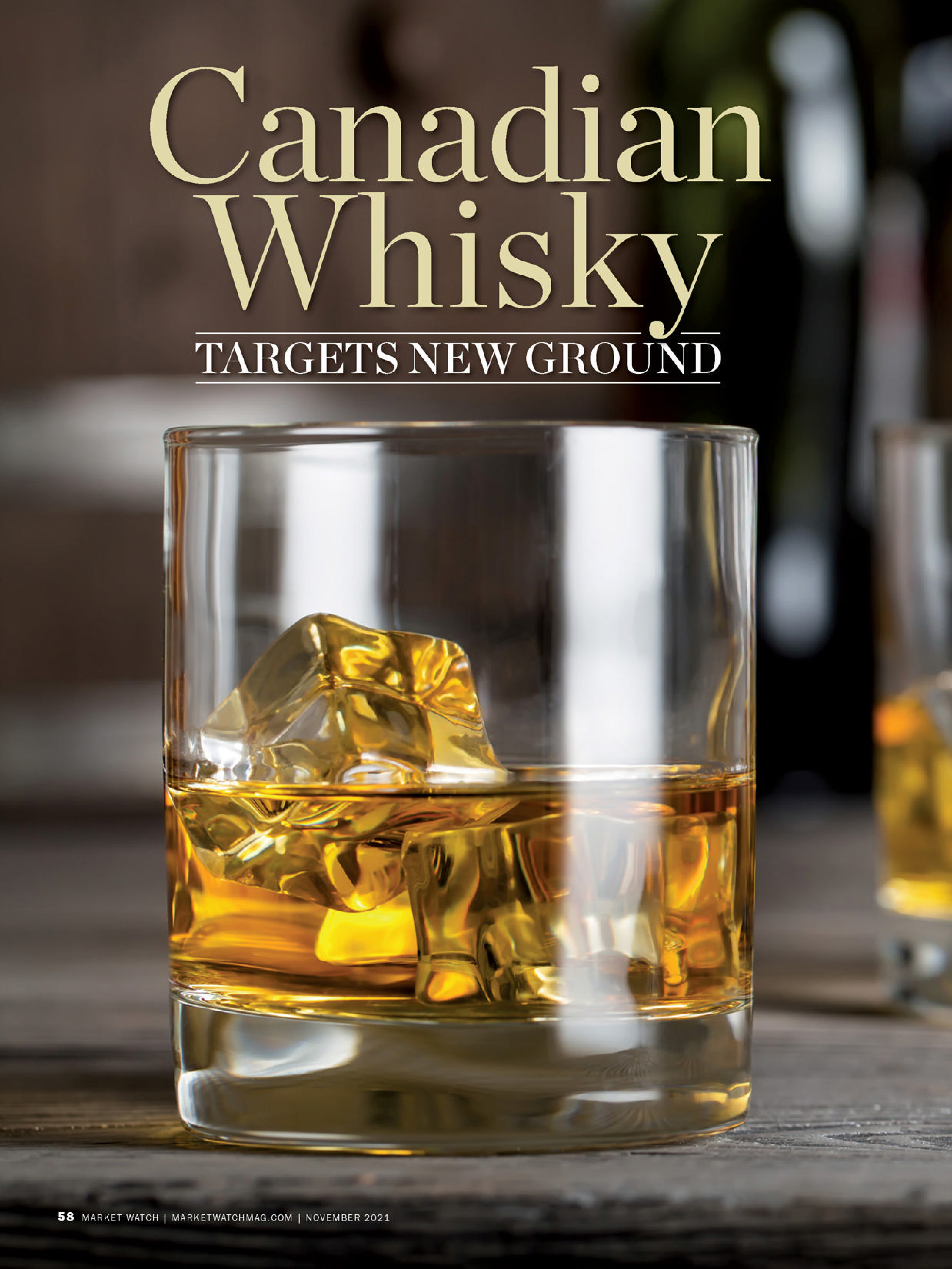


PHOTO BY GETTY IMAGES

Trying to recapture past glory, Canadian whiskies make gains with flavors and super-premium extensions

BY MARY E. KEEFE

The mythology and storied history surrounding Canadian whisky would seem like the perfect opportunity in a spirits market driven by buzzwords like authenticity, heritage, and craft. From its Prohibition-era bootlegging roots to its association with Al Capone to the notion that Canadian whisky-infused Old Fashioneds and Highballs kept speakeasies afloat, the category is well-positioned to thrive in today's whisk(e)y landscape. But, unlike the boon that fellow North American whiskies like Bourbon have experienced in recent years, Canadian whiskies have had trouble gaining traction outside of their domestic market. And even though the category enjoys longstanding popularity in the off-premise and the pandemic fostered an increase in at-home consumption last year, depletions of Canadian whisky fell 1.1% to 12.5 million cases, excluding flavors. However, the tide appears to be turning for Canadian whisky producers, as they have been successfully using innovation in the flavor space, as well as super-premium extensions, to reinvigorate the category and attract new consumers.

Flavors Keep Trucking

The key to unlocking Canadian whisky's potential appears to be innovation in two areas: flavors and upscale bottlings. Last year, depletions of leading flavored Canadian whiskies grew 12.3% to 9.6 million cases. At this rate, the segment will hit 10 million cases this year, and be at parity with the non-flavored market by 2023. At the forefront of the sector is Fireball, the cinnamon-flavored Sazerac label that pioneered the flavor trend in whisk(e)y. While it is closer to a liqueur than a whisk(e)y with its 66-proof content, it paved the way for other Canadian whiskies as well as Bourbons to tap into the liquid's natural, flavor-friendly profile. Consumption of Fireball has slowed in recent years, but last year saw a significant jump back up to double-digit growth, with the brand increasing 12% to 6.3 million cases.

Top suppliers like Diageo have proven themselves mavericks in the space as well with its Crown Royal extensions. While the parent brand

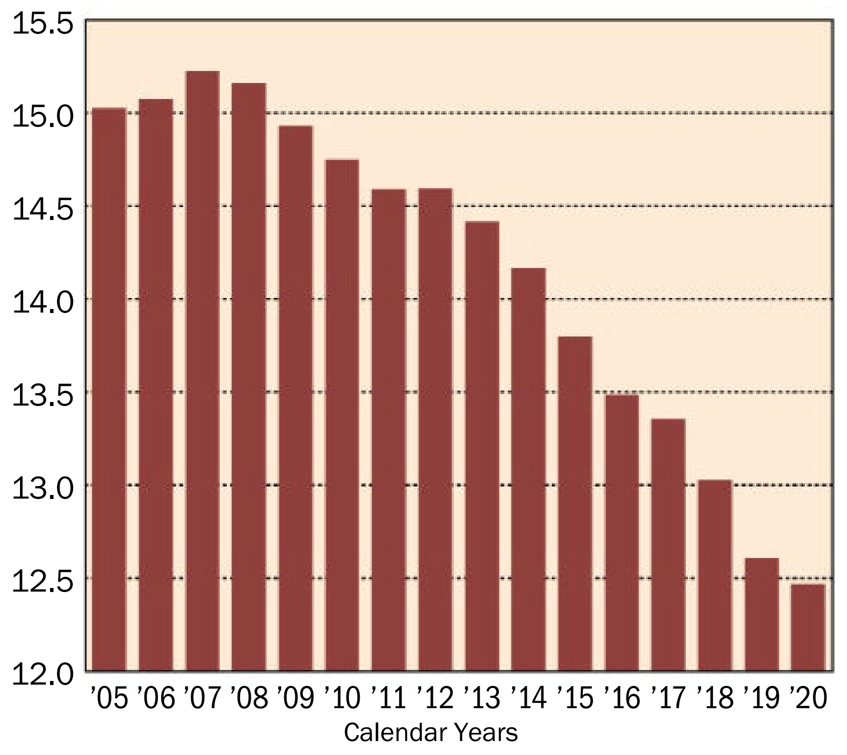
Though Canadian whisky reached a 15-year low in the U.S. last year, there's a lot of room for optimism, as evidenced by Heaven Hill's 2019 acquisition of the Black Velvet brand (bottling line pictured). The brand recently released its first extension since the acquisition: Apple.

PHOTO BY CHRIS BOLIN

grew by a mere 0.5% to 4.1 million cases, each of its active flavors charted impressive gains: Regal Apple jumped 10.5%, Peach leaped 30%, Vanilla increased 11.5%, and Salted Caramel grew 8.5%. ("Retired" Crown Royal flavors include Honey, Maple, and Texas Mesquite.) "Currently, flavored whisk(e)y makes up about one-fifth of the total whisk(e)y category; as a subsegment of whisk(e)y, it's consistently been a contributor in spearheading category growth," says Nicola Heckles, Crown Royal vice president at Diageo North America. "Flavors are adding something playful to what can often be a serious whisk(e)y category, which is attracting a lot of drinkers who would not have considered whisk(e)y before, as well as loyal whisk(e)y drinkers."

CANADIAN WHISKY CONSUMPTION IN THE U.S.—2005-2020*

(millions of 9-liter case depletions)



*Excludes flavors

Source: IMPACT DATABANK ©2021

In March, Crown Royal debuted a line of canned cocktails ($15 a 4-pack of 12-ounce cans; $4 individually), adding another avenue for attracting new consumers to the category. "RTD options are also wildly popular and gaining momentum among consumers for the convenience they bring," says Heckles. The 7% abv RTDs come in three flavors—Whisky & Cola, Washington Apple, and Peach Tea—all made using either Crown Royal's original whisky or one of the brand's flavored variants. They are backed by a new ad campaign, "A Whole New World of Cocktails," featuring Toronto-based hip-hop artist DijahSB and professional gamer Erin Ashley Simon.

Heaven Hill Brands, which acquired Black Velvet from Constellation in 2019, is also invested in Canadian whisky's flavor segment. In February, the company released an Apple extension ($11 a 750-ml.), its first major launch since acquiring the brand, which joins Toasted Caramel and Cinnamon Rush. The 35% abv offering initially debuted in limited markets, and is currently being rolled out nationally. "Canadian whisky in general is such an approachable whisky, consumers are trying it out for the first time through flavors, and it's such an approachable way of entering the space," says Heaven Hill group product director Hannah Venhoff, acknowledging that flavors afford an entry-level crossover opportunity from other American whiskies. She notes that there is a new Black Velvet flavor that the company is currently considering bringing to market in Spring 2022.

Heaven Hill is still in the process of restructuring the brand since acquiring it two years ago. In addition to upcoming flavor extensions, the company will also launch a new Black Velvet ad campaign in the next three to six months. The goal, according to Venhoff, is to create a personality for the brand that resonates with consumers. While Black Velvet remained the No.-2 Canadian whisky label in the U.S., which accounts for 86% of the brand's total depletions at 1.8 million cases, excluding flavors, this was a 3.4% decrease from the previous year. Its flavors, excluding Apple, also declined last year, falling 8.5% to 60,000 cases.

Phillips Distilling Co. has also embraced flavors with its Revel Stoke label. In September, the company relaunched the brand with a makeover that included new packaging and the renaming of its 12 varieties with irreverent monikers like Nutcrusher for its peanut-flavored whisky and Lei'd for its roasted pineapple extension. The relaunch is accompanied by a new tagline, "Stoke Your Wild." According to Phillips' CEO Andy England, the repositioning was spawned by a desire to directly target the demographic that is consuming flavored whiskies: 20-something LDA males. "The niche we've decided to own, we want to be highly relevant to the 25-year-old, legal age male drinker. We want to be highly relevant to that individual, and we think in order to be relevant, you need to bring tons of attitude," he says of the evocative rebranding. "And it's been our observation, no one's brought the kind of attitude that we are bringing. People have gone there a little bit, but they didn't want to get too crazy. We want to go bam in the middle at that target audience and have fun." Next year, Phillips will switch out two of the more "boring and dull flavors" with two new, original flavors. At present, its Pecan extension, Shellshocked, is its top flavor. Last year, Revel Stoke grew 1% to 53,000 cases, according to Impact Databank.

Other leading Canadian whisky producers have tried their hands at flavors, with mixed results. For example, Beam Suntory launched a number of flavor extensions of its Canadian Club label, including Apple, Dock No. 57 Blackberry, and Chairman's Select Maple, but each fizzled. Brown-Forman also debuted a set of flavors for its Canadian Mist label in 2013, including Peach Mist, Cinnamon, and Maple, but they also were unsuccessful. In 2020, Brown-Forman sold the label and its production facilities to Sazerac, along with Early Times and Collingwood whisk(e)y brands, for an undisclosed sum. Canadian Mist was down 4% to 972,000 cases last year, falling below 1 million cases for the first time. This marked a dramatic 35-year decline for the label, which was depleting more than 4 million cases in 2000.

REVEL STOKE
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Many Canadian whisky brands are invigorating their portfolios with myriad flavor extensions. Revel Stoke, a maverick in the category's flavor space, completely revamped its flavor lineup (pictured) this fall, renaming and redesigning the labels.

Super-premiums Bolster Sales

While flavored Canadian whiskies have widened the demographic pool for the category, upscale bottlings have also been successfully attracting consumers to the segment. As has been the long-term trajectory in spirits, premiumization has

TOP TEN CANADIAN WHISKY BRANDS IN THE U.S.

(thousands of 9-liter case depletions)

Rank	Brand[1]	Importer	2015	2016	2017	2018	2019	2020	AACGR[2] '15-'20	Percent Change[3] '19-'20
1	Crown Royal	Diageo North America	4,102	4,076	4,157	4,177	4,095	4,115	0.1%	0.5%
2	Black Velvet	Heaven Hill Brands	1,866	1,870	1,851	1,828	1,805	1,745	-1.3	-3.4
3	Canadian Club	Beam Suntory	1,228	1,230	1,218	1,168	1,124	1,142	-1.4	1.6
4	Canadian Mist[4]	Sazerac Co.	1,355	1,222	1,174	1,081	1,012	972	-6.4	-4.0
5	Windsor Supreme	Beam Suntory	885	843	820	754	739	714	-4.2	-3.4
6	Seagram's V.O.	Sazerac Co.	753	759	731	716	695	705	-1.3	1.5
7	Rich & Rare	Sazerac Co.	685	695	702	695	670	640	-1.3	-4.5
8	Pendleton	Proximo Spirits	224	231	266	298	345	397	12.1	14.9
9	Canadian LTD	Sazerac Co.	530	500	475	456	415	390	-6.0	-6.0
10	Lord Calvert	Luxco Inc.	380	350	290	278	258	254	-7.8	-1.9
	Total Top Ten[5]		**12,007**	**11,776**	**11,682**	**11,452**	**11,159**	**11,073**	**-1.6**	**-0.8**
	Other Brands		1,791	1,709	1,673	1,574	1,448	1,396	-4.9	-3.6
	Total Canadian Whisky[1]		**13,798**	**13,485**	**13,355**	**13,026**	**12,607**	**12,469**	**-2.0%**	**-1.1%**

[1] Excludes flavors
[2] Average annual compound growth rate
[3] Based on unrounded data
[4] Acquired by Brown-Forman in 2020
[5] Addition of columns may not agree due to rounding.

Source: IMPACT DATABANK ©2021

LEADING PREMIUM-PLUS CANADIAN WHISKY BRANDS IN THE U.S.[1]

(thousands of 9-liter case depletions)

Brand	Importer	2015	2016	2017	2018	2019	2020	AACGR[2] '15-'20	Percent Change[3] '19-'20
Crown Royal Deluxe	Diageo North America	3,669	3,725	3,815	3,760	3,760	3,780	0.6%	0.5%
Pendleton	Proximo Spirits	224	231	266	298	345	397	12.1	14.9
Crown Royal Black	Diageo North America	220	199	195	191	193	200	-1.9	3.5
Crown Royal Reserve	Diageo North America	70	65	64	64	70	71	0.1	2.2
Crown Royal XO	Diageo North America	36	25	34	41	49	50	6.5	1.0
Forty Creek	Campari America	68	65	47	46	40	38	-11.0	-5.0
Total Leading Premium-Plus[4]		**4,288**	**4,309**	**4,421**	**4,401**	**4,458**	**4,535**	**1.1%**	**1.7%**

[1] At least $20 a 750-ml. on average
[2] Average annual compound growth rate
[3] Based on unrounded data
[4] Addition of columns may not agree due to rounding.

Source: IMPACT DATABANK © 2021

LEADING FLAVORED CANADIAN WHISKY BRANDS IN THE U.S.

(thousands of 9-liter case depletions)

Brand	Importer	2015	2016	2017	2018	2019	2020	AACGR[1] '15-'20	Percent Change[2] '19-'20
Fireball	Sazerac Co.	4,375	4,615	4,915	5,210	5,625	6,300	7.6%	12.0%
Crown Royal Regal Apple	Diageo North America	1,250	1,278	1,395	1,542	1,720	1,900	8.7	10.5
Crown Royal Peach	Diageo North America	-	-	-	-	450	585	+	30.0
Crown Royal Vanilla	Diageo North America	-	286	412	405	480	535	+	11.5
Crown Royal Salted Caramel	Diageo North America	-	-	50	123	129	140	+	8.5
Black Velvet[3]	Heaven Hill Brands	160	130	100	72	65	60	-17.9	-8.5
Revel Stoke[4]	Phillips Distilling Co.	44	58	56	55	53	53	3.9	1.0
Windsor Supreme Black Cherry	Beam Suntory	-	21	21	22	24	26	+	7.2
Total Leading Flavored[5]		**5,828**	**6,387**	**6,948**	**7,429**	**8,546**	**9,598**	**10.5%**	**12.3%**

[1] Average annual compound growth rate
[2] Based on unrounded data
[3] Includes Toasted Caramel and Cinnamon Rush.
[4] Includes a small amount of non-flavored Canadian whisky
[5] Addition of columns may not agree due to rounding.

Source: IMPACT DATABANK © 2021

bolstered the vast majority of categories, including Canadian whisky. Leading premium-plus bottlings reached 4.5 million cases on 1.5% growth in 2020, making up about a third of total Canadian whisky depletions. As with the brand's flavor innovation, Crown Royal has emerged as a leading player in the premium-and-above space. Its Deluxe extension has a stranglehold on the segment at 3.8 million cases, but its portfoliomates have also performed well, including Black, which grew 3.5%; Reserve, which increased 2.2%; and XO, which inched up 1%. In total, these four expressions accounted for 90% of consumption of the leading premium-plus labels in 2020.

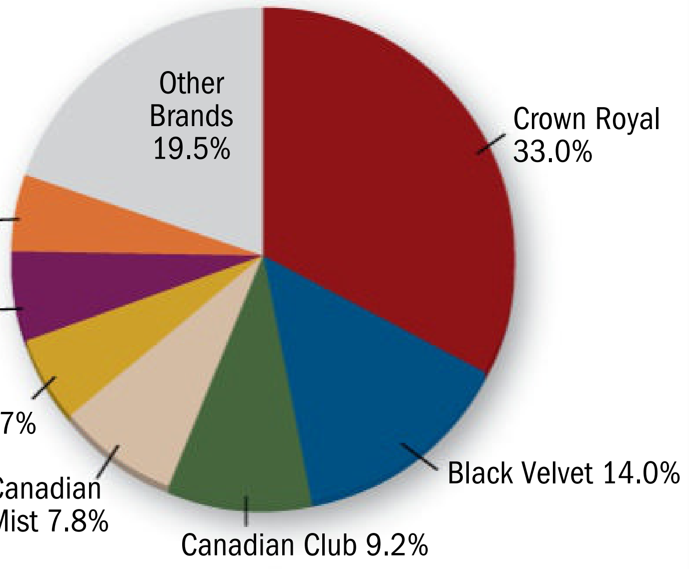
"We're seeing that premiumization is a core driver in the growth of total spirits and total alcohol as consumers continue to trade up within the category," says Heckles at Diageo. "The super-premium and luxury price tiers of whisk(e)y have continued to lead the way and Crown Royal is benefiting greatly from the trend as consumers explore more premium options available to them from brands they trust. Most importantly, the category is responding to new luxury consumers skewing younger, more urban and diverse as old and outdated tropes of the category are quickly being rendered obsolete." Like its strategy with flavors, Crown Royal keeps innovation front and center with its super-premium offerings, including permanent and limited-edition bottlings. This fall, Diageo will launch Crown Royal Aged 18 Years ($140 a 750-ml.) and Winter Wheat ($70 a 750-ml.), the latest offering from its limited-edition Crown Royal Noble Collection series.

"There's no signs of the interest in whisky slowing down, and we expect continued growth of the premium Canadian whisky and rye whisky categories," says Neale Graham, managing director Canadian Brands at Beam Suntory, noting that both its Canadian Club and Alberta Premium are strongly positioned in the premium and super-premium space. While Canadian Club is already well-established in the U.S., Alberta Premium has yet to achieve the same standing it enjoys in Canada. According to Graham, the positive reception of Alberta Premium Cask Strength in the U.S. has made the company optimistic about additional opportunities in the market in the future. In fact, Beam Suntory will release the newest batch of Alberta Premium Cask Strength in the Fall in both Canada and the U.S., as well as the latest expression from its CC Chronicles Series, Canadian Club 44-year-old. Last year, Canadian Club grew 1.6% to 1.1 million cases, making it the third largest Canadian whisky label in the U.S.

"Canadian whisky continues to have a strong presence in the U.S. market, but has grown via a different strategy from Bourbon, Rye, and Scotch," says David Allard, vice president of marketing, Campari Canada. "Premiumization has been the driving force behind these whisky categories and with Forty Creek's award-winning range we believe that we have an important role to play in adjusting consumer's perception of what a premium Canadian whisky can be." He points to

TOP SEVEN CANADIAN WHISKY BRANDS IN THE U.S.*

(share of 2020 depletions)



12.5 million nine-liter cases = 100%

*Excludes flavors

Source: IMPACT DATABANK ©2021

Despite a minimal 0.5% gain last year, Crown Royal (barrel house pictured) remains far and away the U.S. market's top Canadian whisky. While its overall growth was small, the brand's flavor extensions are proving vital, with double-digit growth for expressions like Apple and Peach.

PHOTO BY JEREMY DUECK

the brand's range of super-premium offerings—from its Double Barrel and Confederation Oak labels to its limited-edition bottlings like Master's Cut—as central to reaching consumers and changing the narrative surrounding Canadian whisky. Similar to other suppliers of premium-plus labels, Campari is dedicated to using innovation to woo new consumers, including Master's Cut, its first cask-strength whisky, a limited-edition bottling which launched in the Fall, as well as Foxheart, a 40% abv whisky infused with 12-year-old Caribbean rum, which debuted in the summer. The Italian company acquired Forty Creek in 2014 for $170 million, but the label has yet to make gains in the U.S. Forty Creek was the only leading premium-plus label to decline last year, falling 5% to 38,000 cases.

Premiumization is helping Canadian whisky grow. Brands like Crown Royal, JP Wiser's, Lot 40 (rye selections top), and Forty Creek (Barrel Select above) are all producing higher-priced labels to entice consumers.

While suppliers remain bullish on the category's prospects, establishments like Atlanta's Whiskey Bird illustrate the uphill battle that Canadian whiskies face to become competitive, especially in the on-premise. "Whiskey Bird only has two Canadian whiskies on its list and other than Crown Royal we have not had much success in selling them," says general manager Anthony Vipond. "I think a lot of this is that they are not readily available or featured frequently so most consumers do not know much about Canadian whisky." The whiskey bar and restaurant stocks anywhere between 40-50 whiskies ($5-$48 a 750-ml.) at any given time, and specifically doesn't carry flavored whiskies. Vipond points to a lack of consumer education about the liquid as a reoccurring problem, adding that there needs to be a spark of some sort to increase consumer demand, like the scarcity of bottles did for Japanese whiskies in recent years.

At Chicago's Warehouse Liquors, a bottle shop in the city's South Loop that specializes in whiskies and carries one of the most extensive whisk(e)y collections in Illinois, a similar scenario has played out. "Canadians are often lighter whiskies that seem to be sought out more for their mixability and ease in drinking than distinctions of flavor. It hasn't been as ambitious as other categories," says Warehouse Liquors owner and president Gene Charness. He adds that Canadian whiskies aren't marketed particularly well, and that Scotch and Bourbon have proven themselves more adventurous and creative, doing a better job with combining sweetness and concentration of alcohol. The store carries 1,400 Scotches, 700 American, 60 Japanese, and 60 Irish whiskies, but just 25 Canadian whiskies ($15-$360 a 750-ml.), with Crown Royal the best-selling label. (Charness doesn't sell flavors.) The current most popular alternative to Crown Royal at Warehouse is Caribou Crossing, Sazerac's limited allocation that sells out pretty quickly whenever it's on the shelf. Charness concludes that a successful future for the category would include Canadian whisky suppliers focusing on higher-alcohol offerings, like Alberta Premium Cask Strength, the best rye he has tried this year.

Charting Forward

While Canadian whisky has not had the same burgeoning growth as fellow North American whiskies like Bourbon, the efforts in both the flavored and super-premium arenas have helped return the segment to growth. Seeing the success of these two trajectories, suppliers remain optimistic about the future of the category. "Both premium and flavored options are driving the whisk(e)y category as consumers look to try new whiskies as well as grab their favorites," says Heckles, noting that both trends will continue for the segment. "We haven't seen the pendulum swing for Canadian whisky like it has with Bourbon. But with these different attributes coming forward with new innovation, consumers are connecting the dots," says Heaven Hill's Venhoff. "It's a slower build and will continue to be a slower build. It will be a bit more time before we see premium take hold in this category."

PHOTO BY (TOP) JEFF HARRIS

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Jackson Family Wines (pictured) is looking to regain ground lost in 2020, and with the recent release Avant Lower Calorie Chardonnay, the brand is back in the spotlight.

PHOTO BY BORIS RAJESKI

PREMIUM-PLUS WINE STARS SHOW DOUBLE-DIGIT GROWTH

In the face of 2020's disruptions, premium-and-above wines continue making major gains

BY KIMBERLY THAREL

Despite market disruptions caused by the global pandemic in 2020, the U.S. market's premium-plus table wine category posted remarkable gains, driven largely by the strength of imports and a thriving off-premise channel. The total $10-and-above wine market last year posted 4.4% volume growth in the U.S., adding more than 3.5 million cases to 2019's total, according to Impact Databank. Most leading brands across both the domestic and imported segments achieved significant volume gains, but the overall category's expansion was driven almost entirely by imported standouts like Stella Rosa and 19 Crimes. While the total U.S. wine market is still largely dominated in volume terms by the $10-and-below value segment, the premium-plus segment has been steadily gaining share in recent years. In 2020, wines below $10 a 750-ml. maintained a 70.9% share of the U.S.'s overall wine market at a relatively flat 207 million cases, marking a noticeable decrease from 2000's volume share of nearly 88% of the total market. Meanwhile, wines priced $10 and above have managed to more than double their total share of case depletion volume from 12.4% in 2000 to nearly 30% in 2020. The U.S. market's premium-plus wine category has also gained value share over the past two decades, with a 9.5% share of retail dollars in 2000 growing to a more than 50% share in 2020.

California Juggernauts

The domestic premium-plus wine segment's overall volume remained relatively flat in 2020 at 58.2 million cases in the U.S., while a handful of brands posted double-digit gains. Because of the strength of the imported segment, the domestic side lost a portion of its volume share and ended 2020 with a 68.6% share of total premium-plus table wines in the U.S. But among domestic offerings, those from California remain at the forefront of the category. The domestic segment's top two premium-plus brands are from the Golden State: Josh Cellars and Apothic. Both labels grew by double-digits and crossed into 4-million-case territory for the first time last year. And despite a few volume losses among leading domestic brands, the top 16 premium-plus domestic brands with million-case totals grew collectively by 7% to more than 35 million cases last year in the U.S.

Since opening its doors in August 2020, Fielding's restaurant at the Kimpton Armory hotel in Bozeman, Montana has maintained its position as approachable fine dining while catering to its local market as well as more affluent travelers to the region. "There's a limited wine market here, so the inspiration was to have 100 bottles all under $200," says Mark Musial, executive chef at the Armory Bozeman. Some of its most popular bottles include the Spottswoode Lydenhurst Napa Valley Cabernet Sauvignon ($186 a 750-ml.), Littorai Wendling Vineyard Block E Anderson Valley Pinot Noir ($145), and Jonata Todos Santa Ynez Valley Syrah Blend ($89), all of which hail from California. Overall, Fielding's domestic wines comprise a large portion of on-premise sales, with West Coast Cabernet Sauvignon tends to be the most popular variety.

Deutsch Family Wine & Spirits saw a 33.2% volume gain for its leading brand Josh Cellars, which shot ahead last year to nearly 4.3 million cases from 2019's 3.2-million-case total. In adding more than 1 million cases, Josh Cellars rose to become the leader of the premium-plus segment in volume terms. After joining the Deutsch portfolio in 2011, when it stood at about 20,000 cases in the U.S., Josh Cellars hit 500,000 cases in its first full year with the company in 2014 and has remained one of the hottest brands over the past several years. The grocery store channel has proven essential for Josh Cellars' recent success in the U.S. In IRI channels last year, the California label grew 38.7% to 2.43 million cases, making it the No.-5 supermarket wine brand in dollar terms. The company has noted the significant effort it has put into building Josh Cellars in on-premise channels, with the pandemic-related off-premise expansion causing it to reach new heights.

"Covid-19 initially drove a massive uptick in sales for wine and spirits, as consumers pantry loaded at first, and as the pandemic wore on, they then increased their at-home consumption—a trend that's ongoing," says Deutsch president Tom Steffanci. "The pandemic resulted in accelerating consumer adoption of online shopping and delivery apps. We've increased our investment on e-commerce platforms that work through the three-tier system, with an added presence on Drizly, Instacart, and Vivino." Steffanci also notes that last November the company launched its own DTC channel on Josh Cellars' website and has seen promising initial levels of memberships and transaction value to date.

One of two domineering premium-plus brands in the domestic segment, Josh Cellars (Josh Cellars lineup above left; winemaker Wayne Donaldson above right) has remained a top-selling brand across the board for several years and was recently named No.-2 supermarket wine brand.

Drinks delivery platform Drizly has seen the share of wines priced $20 and above increasing each year. "Despite economic uncertainties, the share of wine sales for $20 and above wines is rising year-over-year, having increased 8% in share from 2019-2021 to date," says head of consumer insight Liz Paquette. "On our platform, wines above $20 account for a 42% share of wine sales year-to-date, scaling from 36% in 2020 and 34% in 2019." While imported wines comprise a slight majority of higher-end wines sales on Drizly, the company points to Napa Valley as its second most-popular region, at 13% share for $20-and-above wine sales, following

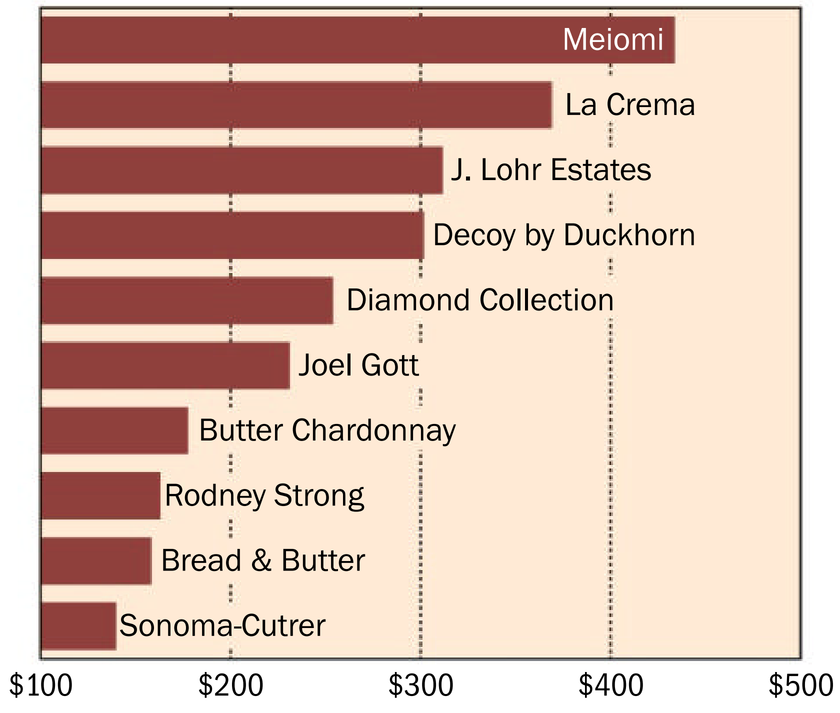
The growth rates of brands like Meiomi (above left) and Apothic (above right) have continued to boom in recent years, with Meiomi maintaining an average growth rate of 14.3% and Apothic boasting a 22% gain in 2020.

Champagne as the overall most popular region with a 20% share of the segment. The Sonoma Coast follows Napa Valley as the third most-popular region among its consumer base. Drizly says Decoy Limited Napa Valley Cabernet Sauvignon has the highest year-over-year growth from 2020 to 2021, followed by La Crema Sonoma County Sauvignon Blanc.

Despite being overtaken by Josh Cellars in volume terms last year, Apothic maintained an impressive growth streak in 2020 with a 22% gain to 4 million cases. Since 2015, the E. & J. Gallo-marketed brand has averaged 10.6% annual growth in the U.S. Last year, Apothic launched its first varietal wine, a Cabernet Sauvignon, which joined Red, Cold Brew, Crush, White, Rosé, Dark, Sparkling, and Inferno in the brand's lineup.

TOP TEN SUPER-PREMIUM CALIFORNIA TABLE WINE BRANDS IN THE U.S. BY 2020 RETAIL VALUE*

(millions of dollars)



*Above $15 a 750-ml. bottle

Source: IMPACT DATABANK ©2021

Third-ranked Kendall-Jackson, also from California, posted a volume decline in 2020, but the popular Sonoma brand remains a formidable competitor with a 3.2 million case total. Jackson Family Wines is looking to regain a growth trajectory with this spring's debut of Avant Lower Calorie Chardonnay ($17 a 750-ml. bottle), bringing the Kendall-Jackson brand into the growing light wine segment. Kendall-Jackson winemaster Randy Ullom worked on the new entrant for three years before getting ready to launch the 2020 vintage as a lower-calorie, lower-carb option to complement the brand's Chardonnay portfolio. The release was supported by an off-premise educational marketing push centered around the added benefits of a lower-alcohol wine, such as fewer calories, less carbohydrates, and being vegan-friendly, which Ullom compares to the recent rise of rosé and canned wines. "Both of those entered the market as new trends, but have brought the quality and longevity to stay," he recently told Market Watch sister publication Impact Newsletter. Jackson Family Wines recently made distributor moves in three states, transitioning its brands to Romano Beverage in Illinois, Johnson Brothers in Minnesota, and Southern Glazer's Wine & Spirits in Pennsylvania. Breakthru Beverage has previously handled the portfolio in all three states and remains partnered with Jackson Family in a half-dozen other U.S. markets.

Constellation Brands' Meiomi has proven to be one of the U.S. market's most popular wines in recent years, with an average growth rate since 2015 of 14.3%. Last year alone, the California premium-plus label shot ahead 17.7% to more than 1.5 million cases, which is roughly double its 2015

TOP TEN SUPER-PREMIUM CALIFORNIA WINE BRANDS IN THE U.S.[1]

(millions of 9-liter cases)

Rank	Brand	Company	Depletions[2]				Average Annual Compound Growth Rate		Percent Change[3]
			2010	2015	2019	2020	’10-’15	’15’20	’19-’20
1	J. Lohr Estates	J. Lohr Vineyards & Wines	0.98	1.45	1.63	1.64	8.3%	2.5%	0.8%
2	Meiomi	Constellation Brands	0.06	0.79	1.31	1.54	70.4	14.3	17.7
3	La Crema	Jackson Family Wines	0.74	1.13	1.30	1.40	8.9	4.5	7.7
4	Joel Gott	Trinchero Family Estates	0.17	0.62	1.10	1.15	30.1	13.3	4.5
5	Diamond Collection	Delicato Family Wines	0.77	1.00	1.00	1.10	5.4	1.9	10.0
	Total Top Five		**2.70**	**4.99**	**6.35**	**6.84**	**13.0**	**6.5**	**7.8**
6	Decoy by Duckhorn	Duckhorn Wine Co.	0.08	0.41	0.85	1.09	38.9	21.8	27.1
7	Butter Chardonnay	JaM Cellars	*	0.19	0.78	0.93	+	37.9	18.6
8	Bread & Butter	WX Brands	-	0.09	0.47	0.88	+	58.5	88.4
9	Rodney Strong	Rodney Strong Wine Estates	0.85	0.91	0.77	0.74	1.4	-4.1	-3.5
10	Simi	Constellation Brands	0.39	0.59	0.57	0.58	8.9	-0.4	0.8
	Total Top Ten		**4.02**	**7.17**	**9.79**	**11.05**	**12.3%**	**9.0%**	**12.9%**

* Less than 5,000 cases

[1] Above $15 a 750-ml. bottle on average

[2] Addition of columns may not agree due to rounding.

[3] Based on unrounded data

Source: IMPACT DATABANK ©2021

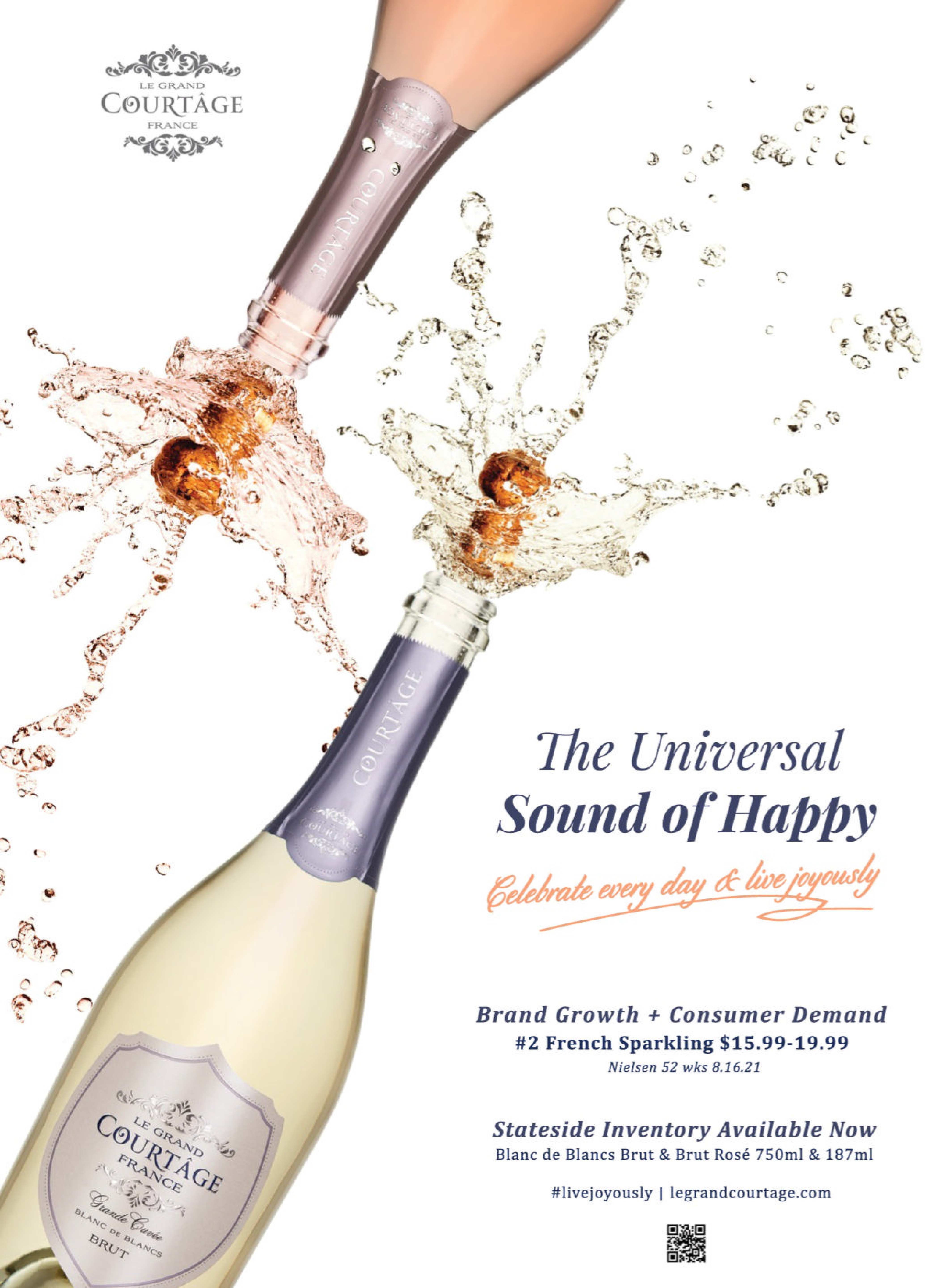
Duckhorn Wine Co. has seen its gateway super-premium label Decoy by Duckhorn (winemaker Dana Epperson pictured) expand greatly in recent years, crossing a million cases last year.

PHOTO BY ROBERT MCCLENAHAN

volume of 790,000 cases. Meiomi’s parent company has recently undertaken a more premium approach by selling several of its below-$11 wine and spirits brands to E. & J. Gallo in early 2021. Constellation followed by aligning with leading wholesaler Southern Glazer’s Wine & Spirits across 70% of its wine and spirits portfolio this April. Moving forward, the company will focus on a pared-down selection of premium-and-above wine and spirits that include Meiomi and premium-plus import Kim Crawford. “Our ambition is to be No.-1 in fine wine, which we define as sold under $75 domestically, and to be among the top five players in luxury and cult wine, while thoughtfully growing our craft spirits portfolio,” Robert Hanson, president of Constellation’s wine and spirits unit, said earlier this year. “Currently that segment is about 12% of our business; we think it can be 25%. We want to take a business that’s just under $300 million and have it grow well over $600 million, and we’d like to do that in a relatively short period of time. We can get about halfway there with organic growth, but we’re also going to be engaging in merger and acquisition activity to add great brands into the mix that are not redundant to our existing portfolio.”

Coppola’s Diamond Collection grew by 10% in 2020 to 1.1 million cases in the U.S. In June, Delicato Family Wines acquired Francis Ford Coppola Winery for an undisclosed sum. The move bolsters Delicato’s premium wine portfolio with the addition of Diamond Collection, which includes Claret, Pinot Noir, Merlot, Malbec, Zinfandel, red blend, Chardonnay, and rosé, among others. “There is a strong cultural fit between our two companies, and by combining two highly complementary portfolios, we create a more diversified winery,” says Delicato president and CEO Chris Indelicato.

Duckhorn Wine Company has witnessed its gateway brand Decoy by Duckhorn accomplish significant volume gains in the U.S. market in recent years. Between 2015-2020, the premium California label expanded by 21.8% annually, with growth last year hitting 27.1% to cross into million-case territory for the first time. The company notes that while on-premise activity has revived somewhat quickly for consumption of its wines, off-premise remains resilient. Duckhorn will continue to stoke growth for its white-hot Decoy label while looking toward innovations such as the well-received Decoy Seltzer offshoot that debuted nationally in March. The premium 5.5% abv varietal wine-based seltzer lineup includes Chardonnay with Lemon & Ginger, Sauvignon Blanc with Vibrant Lime, Chardonnay with Clementine Orange, and Rosé with Black Cherry ($15 a 4-pack of 8.4-ounce slim cans).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Outside of California, Washington's Chateau Ste. Michelle saw a decline of 4% in the U.S. in 2020. It was part of a difficult year for Ste. Michelle Wine Estates, with volume decreases also seen on its Columbia Crest and 14 Hands labels. But the company has seen improved results so far in 2021. Last November, industry veteran David Dearie took over as CEO and has expressed confidence that U.S. consumers can discover Washington and Oregon wines. "I definitely think Washington wines are underrepresented in the U.S. and they're underrepresented globally. So, I'm keen to figure out how we can make them more accessible to people," Dearie recently told Impact. In July, Ste. Michelle agreed to be acquired by New York's Sycamore Partners for $1.2 billion, and the acquisition was recently completed. "Any private equity group that buys into the branded alcohol business is making a big commitment, because it takes them out of the retail sector from a three-tier point of view," Dearie noted. "That in itself is a statement, and we're excited about partnering with them because our ambitions are aligned."

Treasury Wine Estates' 19 Crimes turned to the Golden State and rapper Snoop Dogg (pictured) to continue boosting sales. 19 Crimes Snoop Cali Red fared so well in its initial year the partnership followed up with Snoop Cali Rosé earlier this year.

Imports Up Double-Digits

The leading imported premium-plus wine brands were responsible for much of the category's overall growth in 2020. Total imported premium-plus wines grew by 15.2% last year in the U.S. to reach 26.7 million cases by adding 3.5 million cases, increasing the segment's volume share to 31.4% of premium-plus wines. The segment's five leading million-case brands each posted double-digit gains, with leader Stella Rosa jumping ahead 111.6% in volume.

Imported wines on Drizly comprise a 56% share of wines purchased at $20 and above on its delivery platform, with the company noting that among wines across all price points the domestic-imported split is an even 50%. "Champagne holds the largest percent share of higher priced wine sales on Drizly, with 20%, an increase of 12% when compared to Champagne's 8% share of wine sales across all price points," says Drizly's Paquette. While Cabernet Sauvignon, Pinot Noir, and Chardonnay make up the top three most popular varietals priced above $20 on Drizly, the company notes trendy styles like orange wines are also accelerating growth, as well as women- and minority-owned brands in the category.

Los Angeles-based Riboli Family Wines has seen its standout Italian brand Stella Rosa make remarkable gains in recent years, growing from a 1-million-case brand in 2015 to 2020's volume of nearly 5.3 million cases in the U.S. It's the only leading premium-plus brand that currently stands at over 5 million cases in the U.S. "A lot of that growth was actually seeded in 2018 and 2019," explains Steve Riboli, president of Riboli Wine Estates. "We're looking forward to another really good year with a target growth of 30% for 2021." With a core range priced in the competitive $11-$13 a 750-ml. segment, Stella Rosa has gained a loyal following for its fruit-flavored wines, as well as semi-sparkling and semi-sweet offerings and its higher-end Rosso Lux and Black Lux ($15-$17) wines. Last fall, Stella Rosa debuted a higher-alcohol Royale wine with an abv of 8%, compared with 5% for its other wines.

The second-leading imported premium-plus wine in the U.S., Treasury Wine Estates' 19 Crimes is also a standout. The Australian import grew by nearly 34% last year in the U.S. to approach 2.2 million cases. Since 2015, 19 Crimes has grown by about 53% annually from 262,000 cases achieved that year. Last summer, the company partnered with rapper Snoop Dogg for the launch of its first California-sourced option, Snoop Cali Red ($12), which was the No.-1 new wine item launched in 2020, according to IRI data. This year, the brand followed with a Snoop Cali Rosé, which was backed with a TV ad campaign during the NBA Finals.

The remaining top-three imported premium-plus each managed outstanding volume gains last year. New Zealand's Kim Crawford shot ahead 18.3% to 1.6 million cases in the U.S. Parent company Constellation Brands is eyeing expansion into the lower-calorie wine segment with last fall's launch of its Illuminate range, which includes Sauvignon Blanc and rosé wines (both $18). Meanwhile, Italian label Roscato shot ahead nearly 23% in 2020, and Oyster Bay from New Zealand grew by 15.3%. Palm Bay International recently expanded the Roscato brand with Gold, its latest sweet, slightly effervescent wine. The 7% abv offering is made with grapes sourced from northern Italy and joins Rosso Dolce, Rosé Dolce, Moscato, Dark, and Smooth in the lineup. Roscato Gold retails at around $13 a 750-ml.

As the U.S. market continues to move forward from the disruptive events of the pandemic, strong opportunities for growth remain for premium-plus wine brands that can adjust to shifting market conditions and emerging consumption and lifestyle trends. mw

Amari & Digestifs

Continue Their Upward Climb

This multifaceted category is seeing rising popularity and reach thanks to savvy mixologists and adventurous consumers | **BY LAURA PELNER**

As demand for lighter, lower alcohol cocktails continues to grow, bartenders are turning to classic aperitifs like Lillet (pictured), Campari, and Aperol to create simple and accessible drinks.

Few spirits categories are as misunderstood in the United States as amari, aperitifs, and digestifs. Traditionally well received in Europe, these bitter liqueurs and fortified wines are often confusing for American consumers. But over the last few years they've gained real traction here, especially in bars and restaurants, where mixologists are playing with them in a range of cocktails to introduce new drinkers to their flavor profile and usability. Many of the top brands in amari, aperitifs, and digestifs have experienced growth recently, and the rise in low-alcohol cocktails further propelled them on drinks menus this summer.

"In the United States, we've just begun to scratch the surface of aperitifs," says Kerri Owen, the U.S. brand lead for Lillet at Pernod Ricard USA. "We're just now learning and loving to embrace the lifestyle that many parts of Europe have enjoyed for so long. People here are already drinking aperitifs, but not everyone knows how to talk about them or what sets them apart. We think the best approach is to present simple, accessible cocktails that provide a foundation to explore without pretense."

Lillet ($20 a 750-ml.) has been around for more than a century and Owen says it's benefiting today from consumer demand for low-alcohol and lighter-style cocktails. She adds that the brand's top markets globally include Germany, Austria, and France, but that the U.S. is poised to overtake France by volume sold within the next year, and she expects that growth to accelerate as the on-premise continues to reopen. Lillet posted 45,000 9-liter case depletions in 2019, a 14% increase over the year prior, according to Impact Databank. In 2020 it grew to 47,000 9-liter cases. "Lillet is truly a hybrid and has been the darling of bartenders since its inception, in part because of its inclusion in timeless cocktails like the Vesper," Owen says. "We're actively opening up new regions in Asia and South

PHOTO BY (OPPOSITE) PHILIP HARVEY

Aperitifs and digestifs are a traditional staple in Europe, but the U.S. is catching on as bartenders incorporate classic European amaro brands and flavors into their cocktails, sparking new interest in these products.

America. The global ambitions for this brand are great."

Jane Danger, a national mixologist for Pernod Ricard USA, notes that the resurgence of drinks like the Negroni, Spritz, and Highball have propelled amari, aperitifs, and digestifs forward, and she adds that bartenders who update classics like the Manhattan by swapping in aperitifs and digestifs for traditional vermouth are further increasing visibility for the category. The variety of essences and aromas found in these products makes them very versatile, she says, pointing to flavors from roots, citrus, herbs, and spices to fruits and flowers. Pernod Ricard USA has a deep portfolio of aperitifs and digestifs. Along with the Lillet, the company represents Suze liqueur, and its namesakes Pernod and Ricard.

Jägermeister (above) has long been the category leader for aperitifs and digestifs in the U.S., but brands like Fernet-Branca (top) are gaining ground, capturing the attention of knowledgeable drinkers and mixologists.

"For a long time these were viewed as something only adventurous people drank, but now amari are for people who want to try something new," Danger says. "We've seen so much growth. Aperitifs and digestifs are excelling everywhere. They've become one of the most sought-after ingredients to mix with spirits in bars, and at home they require little mixology skill to make a delicious cocktail, just add ice and top with soda. It can be simple. The growth for aperitifs and digestifs is infinite and goes hand in hand with the growth of food and dining culture. I see nothing but upward trends for amari."

Bar Kings

Jägermeister has long been an aperitif and digestif category leader in the United States, earning acclaim in bars and restaurants as a shot favorite. The brand posted 1.15 million 9-liter case depletions in 2020, according to Impact Databank. "The category has seen more interest than ever," says Charles Littlefield, the vice president of brand marketing for Jägermeister U.S. "The United States doesn't have the same aperitif and digestif tradition as Europe, but we've seen sustained momentum here by bringing traditional European brands and flavors into cocktails. Low-alcohol drinks and seasonality drive people to the category."

While on-premise sales plummeted last year amid Covid-19 shutdowns, Jägermeister ($25 a 750-ml.) saw a big increase in retail sales. Littlefield says the brand benefited from high single-digit gains off-premise, driven by at-home cocktail trends and bolstered by the fact that Jägermeister is a well-established and trusted brand in the United States. He adds that the Jägermeister consumer spans a wide range of demographics and that the herbal liqueur attracts drinkers who don't otherwise consume aperitifs and digestifs.

"Jägermeister has always reached consumers by becoming a staple in local bars and restaurants," Littlefield explains. "Aperitifs and digestifs are more popular globally, but the category has sustained growth in the American market. The rise in cocktail culture has spurred the category. Now, we're focused on expanding our offerings to recruit a new generation of Jägermeister drinkers through innovative portfolio offerings." Along with its flagship herbal liqueur, Jägermeister offers a cold brew coffee offshoot ($25 a 750-ml.) and the upscale oak-aged offering Jägermeister Manifest, which is only offered in a 1-liter bottle ($50).

Jägermeister has long been embraced as a standalone shot, but there are several other aperitifs and digestifs that have recently become darlings in the mixology world, from Campari and Aperol to Fernet-Branca. An Italian amaro, Fernet-Branca ($35 a 750-ml.) is mixed into a variety of drinks. Edoardo Branca, a sixth-generation family member who serves as managing director of Branca USA, says the United States is among the company's top markets, along with Italy and Argentina. He describes the Fernet-Branca consumer as a more mature drinker with a developed and refined palate, though he notes this can span a wide variety of consumer demographics.

"As U.S. palates continue to mature, consumers are embracing bitter flavors and are more willing to step into territories they haven't previously explored, which bids well for Fernet-Branca," says Branca. "In the United States, cocktail culture is king, whereas globally we see more consumers sip

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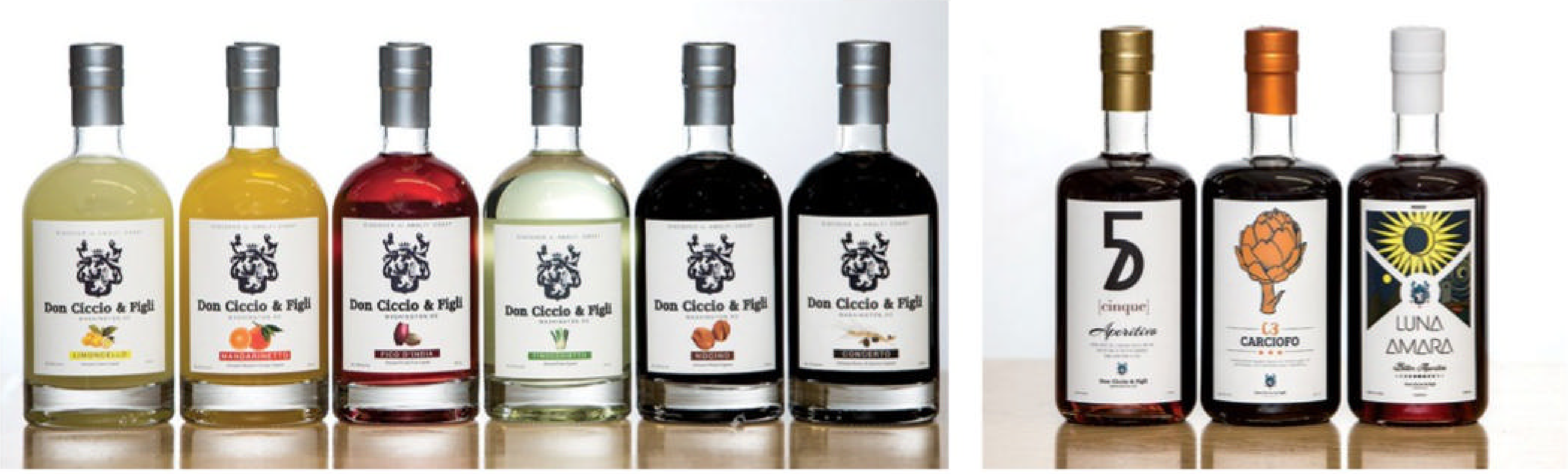

American Distillers are leaning in to the popularity of aperitifs and digestifs and making their own expressions. Washington, D.C.-based Don Ciccio & Figli (bar top) launched its first amaro in 2014 and now produces 20 aperitif labels (offerings above).

Fernet-Branca neat or over ice. But cocktails are often a gateway for products to enter consumers' drinks repertoires, and as they start to think about the individual ingredients in their cocktails, especially with digestifs like Fernet-Branca, they often begin to experiment with sipping them, too."

Branca adds that his family's flagship digestif is a favorite shot among bartenders, saying mixologists often call it the bartender's handshake, and he notes that the general public has recently embraced a Branca Collins, where Fernet-Branca replaces the traditional gin. "We believe the aperitif and digestif category is on a significant growth trajectory," Branca says. "American consumers are learning and becoming more intrigued by amari, aperitifs, and digestifs and how to drink them."

American Made

American distillers are also learning about the category, and many are diving into it to showcase the diversity of these spirits and fortified wines. Washington, D.C.-based Don Ciccio & Figli launched its first amaro in 2014 and started distributing its products nationally in 2016. Today, Don Ciccio & Figli makes 20 aperitif labels and distributes them to 40 states, and the company is readying for international expansion.

Don Ciccio & Figli's president and master distiller Francesco Amodeo says he first saw a noticeable shift and increase in U.S. sales in 2018. "Don Ciccio excels in the on-premise because bartenders use them in a lot of cocktails," Amodeo says. "It's a wide and broad category and awareness has definitely increased. The more bartenders use them, the more people get comfortable with them and understand the differences between our products. There's been a huge shift in perception and more growth is coming."

Some of the company's amari, aperitif, and digestif labels include Don Ciccio & Figli flavored liqueurs in offerings like lemon-based Limoncello, Mandarin orange-based Mandarinetto, fennel-based Finocchietto, and barley and espresso-based Concerto, and specialty labels like Cinque, infused with bitter orange and gentian lutea; Carciofo, flavored by artichokes; and

PHOTOS BY (TOP) RAY LOPEZ; (BOTTOM) RONALD FLORES

Luna Amara, a true bitter aperitif (the lineup ranges from $32-$34 a 750-ml.). "There's definitely more growth coming," Amodeo says. "My personal goal is to have as many American producers make these products as possible to showcase the diversity of the products and their uses at the bar."

In St. Louis, craft distiller 1220 Spirits added the amaro Spettro ($42 a 750-ml.) and the aperitif Flora ($32) to its roster in 2019 to complement a range of gins and vodkas. The products are available on- and off-premise in Missouri and are doing well. "We're big believers in the category and are excited to be making these products," says 1220 Spirits sales manager, Nick Kanter. "Progressive bar programs have lit a fire under the entire category of aperitifs and digestifs. The success of the category can't be accurately defined by sales, but rather through the collective momentum we're seeing throughout the spirits world."

Kanter adds that restaurants and bars are leading the charge on consumer awareness for amari, aperitifs, and digestifs, and that cocktail culture has redefined the category, in turn creating opportunities for these products in the off-premise. Going forward, he says, more education is key. "We expect to see significant growth from new entrants and renewed interest in the imported titans of the category," Kanter says. "It's exciting to see wholesalers get deeper portfolios of amari, aperitifs, and digestifs, and we're excited to see both domestic and regional brands come to life."

Yellowbelly

On-Premise Push

Bartenders who use amari, aperitifs, and digestifs in mixed drinks deserve much of the credit for helping push the category toward the mainstream in the United States. Tim Wiggins, the co-owner and beverage director for St. Louis venues Lazy Tiger cocktail bar, Yellowbelly restaurant, and Retreat Gastropub, says roughly two-thirds of his cocktails across the three concepts have some type of amari or bitter component and the vast majority of his aperitif and digestif sales come from mixed drinks. Popular selections include the Juice Box Hero ($12 at Yellowbelly), made with Averna and Amargo Vallet amaros, Plantation Original Dark rum, Angostura Aromatic bitters, a house-made India pale ale syrup, lime and pineapple juices, and orgeat syrup. Overall, he says Averna, Campari, and Aperol are among his top-selling amari, and he adds that his bar staff also likes to work with Pasubio Vino amaro, Bonanto Aperitivo, and Bigallet China-China liqueur.

"St. Louis has a high cocktail IQ," Wiggins says. "The growing awareness that bitter flavors can enhance cocktails in a unique way will only continue to grow the popularity of the category. We're not seeing any dip in interest or demand for aperitifs and digestifs. Ultimately, bartenders love amari so it will always be on trend."

Aperitifs and digestifs have stepped into the spotlight thanks to on-premise venues like Yellowbelly (Hopes & Dreams cocktail top) in St. Louis and New York City's Overthrow Hospitality (beverage director Sother Teague above).

PHOTO BY (CENTER) ERIC MEDSKER

Sother Teague, the beverage director for Overthrow Hospitality in New York City, has made amari the basis of his drinks program at the intimate bar Amor Y Amargo in Manhattan's East Village neighborhood. The venue opened in 2011 and offers more than 100 amari, aperitif, and digestif labels, using many in its specialty cocktails ($17). For the summer, Amor Y Amargo highlighted a variety of Spritzes made with all manner of aperitifs and digestifs mixed with seltzer.

"Many of our guests visit with the intention of discovery," Teague explains. "Amari are most popular in cocktails at Amor Y Amargo and all of our cocktails have one mixed in." He points to brands like Aperol, Montenegro, Select Aperitivo, Del Capo Vecchio, and Ramazzoti Rosato as popular labels and notes that Amor Y Amargo attracts a diverse group of drinkers, from seasoned cocktail aficionados to adventurous and nostalgic drinkers. "Amari has been continuously growing for years," Teague adds. "It's a small share of the overall market, but it will continue to trend upward for a long time." mw

Crafted With Care

American craft spirits, and cocktails featuring them, tell a unique story

BY SALLY KRAL

Though still considered the "little guy" in the overall spirits market, the U.S. craft spirits industry has grown over the past couple decades from a niche segment to a bustling category with newcomers joining each year. "It used to be that people were all about brand recognition and the large brands with big marketing budgets really had a hold on the spirits industry and market—there were smaller craft distillers back then, but it was a much more limited and difficult market for them to break into," says Stephanie Reading, bar manager of Birdie G's in Santa Monica, California. "Then came the craft beer revolution, which is when people started to recognize the real value in smaller, more local craft brewers. This really changed the way the public looked at the beer industry and what beer could be, which I believe helped open the doors to questioning what spirits could be, and thus ushered in the influx of small American distilleries that we're experiencing today."

Craft spirits shine in cocktails like the Liberty Bell Libations (pictured) from Birdie G's in Santa Monica, California, which features Aviation American gin.

Jacky Li, the director of outlets for The Ameswell hotel in Mountain View, California, attributes the growth of the U.S. craft spirits industry to the changing preferences of American drinkers. "I think it really stems from people demanding more from the products that have long been considered staples in the bar industry," he says. "Consumers grew tired of seeing the same brands at every bar, and so people started experimenting with different ways of distilling vodkas, gins, and whiskies, coming up with clever ways to deliver a product that meets the needs of the consumer."

While the big names in the spirits industry aren't going anywhere, the wide range of U.S. craft spirits on the market today offer a lot to keep consumers and bartenders excited. "Craft distilleries are popping up all over the country, giving the category the same kind of regional feel that we've been seeing in craft beer over the last 15 years," says Natalie Newberry, lead bartender at Henley in Nashville, Tennessee. "Bartenders now have a much more expansive palate of U.S.-made spirits to choose from when creating cocktails."

Indeed, there's more out there now than ever before, and these smaller distilleries continue to push the envelope with their unique products. "Master distillers across the nation are not only attempting to improve the quality or taste of a traditionally made spirit by using different water sources or sourcing local artisan ingredients, but many are experimenting with new distillation methods or nontraditional ingredients and flavor profiles, really broadening the idea of what these spirits can be," Reading says. "And as the American craft spirits category has grown in recent years, so have the drinks made with them. The American palate has evolved and with all these new small-batch spirits on the market comes an unlimited possibility for new and exciting cocktails."

PHOTOS BY (LEFT) LINDSEY HUTTRER; (OPPOSITE) ALEXANDER STEIN

Local craft spirits are a good selling point for bars and restaurants. At Roger in The Ameswell hotel in Mountain View, California, the Moffett Mule (pictured) uses Tahoe Blue vodka, which is made with Lake Tahoe water.

On Hilton Head Island, South Carolina, Lucky Rooster Kitchen + Bar uses Bulrush gin, which is made on the island, in the A Violet 75 (above left), while the Sutler's Fizz (above right) from Winston-Salem, North Carolina's The Katharine uses Sutler's gin, from the town's first legal distillery in 200 years. At Audubon in Boston, the Patio Crusher (top right) uses St. George Spirits Green Chile vodka.

Drink Local

Almost all of the spirits on the Birdie G's beverage menu are craft and small-batch, the majority of which are U.S. brands, according to Reading. "I love supporting the underdog—the smaller guys really doing a great job and producing products worth pushing," she says. "What matters the most to us is that, with a little guidance on our part, all of our guests leave with an increased appreciation, understanding, and hopefully love for small-batch spirits."

Thankfully, today's consumers are very open to new, interesting cocktails and spirits, Reading adds. "People aren't just looking to get drunk on sweet cocktails masking cheap booze. Instead, they want a story and experience that comes with the drink they order or the spirit they sip on," she says. "They want to know where the wheat comes from or why the botanicals are sourced in a particular area and how this affects the spirit, just as much as they want to know that the juice in their drink is freshly squeezed, the honey is locally sourced, and the fruit is from a farmer's market." Her Liberty Bell Libations ($16) features Aviation American gin, house-made wildflower honey syrup, lemon juice, muddled red and yellow bell peppers and black peppercorns, and a pinch of salt, while her Oh My Darling ($16) comprises Star Keeper gin, Carpano Bianco vermouth, Cointreau orange liqueur, Bittermens Xocolatl Mole bitters, and Regans' No. 6 Orange bitters. "Aviation gin out of Portland, Oregon finds a home in quite a few of our gin-based drinks due to its mellow botanicals and approachable price point," Reading notes. "Even more locally, the Spirit Guild is a Los Angeles craft brand I really enjoy working with. Their Vapid vodka and their Star Keeper gin are distilled from California-grown clementines, which imparts wonderfully subtle citrus notes into their products."

There seems to be a craft distillery in just about every U.S. city these days, offering bars and restaurants ample opportunity to highlight their community's offerings on their beverage menus. At The Katharine Brasserie & Bar in Winston-Salem, North Carolina, bartender Justin Rankin's Sutler's Fizz ($14) mixes Sutler's gin from Sutler's Spirit Co.—Winston-Salem's first legal distillery in 200 years—as well as house-made hibiscus syrup, fresh lemon juice, and Bouvet Signature Brut

Champagne. At Lucky Rooster Kitchen + Bar on Hilton Head Island, South Carolina, A Violet 75 ($12) blends Bulrush gin, Rothman & Winter Crème de Violette liqueur, house-made lemon syrup, fresh lemon juice, and La Marca Prosecco. “I’ve always loved Bulrush gin, made here locally on Hilton Head Island,” says bartender Monica Collins, who made the drink along with bar manager Jenn Hodges. “Supporting local distillers is important to the spirits community as well as our small business community. Our guests love a story and are enthusiastic about trying new things.”

Li of The Ameswell appreciates that smaller local distilleries tend to have interesting stories to tell. “At The Ameswell’s bar and restaurant Roger, one of the goals I have is for guests to come in and inquire about the California craft spirits we carry and for us to be able to tell their stories of how they started and how they ended up doing what they do,” he says, adding that Tahoe Blue vodka, which is made with water from California’s Lake Tahoe, is very popular with guests. At Roger, the Moffett Mule ($15) is available on tap and features Tahoe Blue, house-made ginger syrup, lime juice, sparkling water, and Angostura bitters. It was created by San Francisco-based mixologist Greg Lindgren, who developed the cocktail program for The Ameswell.

The Oh My Darling (left) from Birdie G’s is made with Star Keeper gin, which is distilled from California-grown clementines, while the Wrap Your Lips Around This (right) from Lucky Rooster uses Savage & Cooke Service rye whiskey, finished in Cabernet Sauvignon barrels.

“Bartenders can often act as the bridge between products and consumers,” Henley’s Newberry notes. “If we find a spirit we like, we’re going to scramble to make a cocktail with it to play with its flavor profile and see what kind of accents and supporting ingredients will work with it.” She adds that there’s a lot of interest in Belle Meade Bourbon and Nelson’s Green Brier Tennessee whiskey among guests, as the distillery where these spirits are produced is less than ten minutes from Henley.

American Craft Spirit-based Cocktail Recipes

OH MY DARLING
By Stephanie Reading

Ingredients:
2 ounces Star Keeper gin;
¾ ounce Carpano Bianco vermouth;
¼ ounce Cointreau orange liqueur;
2 full droppers Bittermens Xocolatl Mole bitters;
2 dashes Regans’ No. 6 Orange bitters;
Orange peel.

Recipe:
In an ice-filled mixing glass, combine gin, vermouth, liqueur, and bitters. Stir and strain into a Nick & Nora glass and garnish with an orange peel.

MOFFETT MULE
By Greg Lindgren

Ingredients:
2 ounces Tahoe Blue vodka;
¾ ounce ginger syrup[1];
¾ ounce lime juice;
Dash Angostura bitters;
1 ounce sparkling water;
Mint sprig.

Recipe:
Pour vodka, syrup, and juice into a Collins glass. Add crushed ice and use the paddle side of a bar spoon to mix the ingredients. Top with more crushed ice and bitters. Garnish with a mint sprig.

WRAP YOUR LIPS AROUND THIS
By Monica Collins

Ingredients:
1½ ounces Savage & Cooke Lip Service rye whiskey;
½ ounce Cocchi Cocchi Vermouth di Torino;
½ ounce Cappelletti aperitif;
3-4 drops Peychaud’s bitters;
Flamed orange peel.

Recipe:
In an ice-filled mixing glass, combine whiskey, vermouth, aperitif, and bitters. Stir and strain into a rocks glass over a large ice cube. Garnish with a flamed orange peel.

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[1] Heat 4 quarts water on the stovetop, then add 8 quarts white sugar and stir until sugar dissolves. Let cool, then stir in 3 quarts ginger juice.

PHOTO BY (LEFT) STEPHANIE READING

Mixologists enjoy American craft spirits because they tend to put twists on traditional offerings. At Washington, D.C.'s 1310 Kitchen & Bar, the "Blonde Ambition" Madonna (top), a pomegranate Moscow Mule, highlights Wheatly vodka, while the Old Fashioned (above) showcases Belle Meade Bourbon and house-made vanilla syrup.

"The Nelson's Green Brier story is pretty unique as well: It's run by two brothers who brought their ancestors' distillery back to life," she says. Bartender Benjamin Rouse's The Old Bell ($15) mixes Belle Meade Bourbon, Licor 43 liqueur, Lustau Amontillado Sherry, Pernod absinthe, and Regans' No. 6 Orange bitters. "We're also big fans of Castle & Key gin from Kentucky," Newberry adds. "It has a really cool origin story rooted in place and history, and it makes for killer gin concoctions." Rouse's Henley G&T ($12) blends the gin with house-made cucumber shrub, house-made pink peppercorn tincture, lime juice, and The Bitter Truth Tonic bitters.

Familiar, Yet Unique

One of the defining characteristics of U.S. craft spirits is that there are very few rules or strict guidelines for making them, leaving a lot of room for distillers to have fun and experiment. "American craft spirits have grown to have a varied selection of brands that don't have to conform to the customary standards of making a spirit," says Wilfredo Castillo, bar manager at 1310 Kitchen & Bar in Washington, D.C. "They can be made from a wide range of ingredients and aged in all types of barrels from Bourbon to wine, and so they often have surprising notes that can only elevate a cocktail. I've enjoyed seeing how they can bring some fun to a classic recipe." His Old Fashioned ($12) blends Belle Meade Bourbon, house-made vanilla syrup, Angostura Orange bitters, and a splash of club soda, while his "Blonde Ambition" Madonna ($12) is a pomegranate Moscow Mule comprising Wheatly vodka, lime juice and pomegranate juices, simple syrup, and Fever-Tree ginger beer.

"American craft spirits tend to take traditional categories like Bourbon or London Dry gin, and then twist them a bit, creating new expressions that don't necessarily fit within the rules of the original style," Newberry says. "Adding unexpected botanicals that at times eclipse the flavor of juniper in a gin, or finishing a Bourbon in wine, Sherry, or Cognac casks—American craft spirits tend to pay homage to a style and then do something completely original." At Lucky Rooster, Collins' Wrap Your Lips Around This ($14) features Savage & Cooke Lip Service Rye whiskey—made by Napa Valley winemaker and distiller David Phinney and finished in Cabernet Sauvignon barrels—Cocchi Vermouth di Torino, Cappelletti aperitif, and Peychaud's bitters. "This cocktail is a riff on the Boulevardier and perfect for fall and winter," Collins says. "Using Lip Service, you get a nice rye spice with a smooth finish from the Cabernet barrels." At Birdie G's, Reading's Meet me Under the Cherry Tree; the Great American Legacy ($17) comprises Angel's Envy Bourbon, which is finished in Port casks, as well as Cocchi Vermouth di Torino, Cherry Heering liqueur, lemon juice, and the syrup from a jar of Luxardo Maraschino cherries.

"From sourcing the raw ingredients to the distillation process and choice of stills themselves, American craft distillers really take pride in taking the time to create something truly theirs: uniquely American and beautifully executed," Reading says. "Of course, there's Bourbon and rye, the tradi-

PHOTO BY (BOTTOM) RENEE COMET

In Nashville, Henley highlights craft spirits with a story. The Old Bell (pictured) features Belle Meade Bourbon, which is made at Nelson's Green Brier Distillery—just ten minutes from the bar—by two brothers reviving their ancestor's distilling legacy.

PHOTO BY ANDREA BEHRENDS

tionally American spirits that have rich history, but it doesn't stop there. Many distilleries these days are even dabbling in creating American versions of traditionally non-American spirits such as amari, absinthes, and even single malts. I'm always impressed with the products produced by St. George Spirits out of Alameda, California, which has an entire line of artisanal spirits all created in copper pot stills and run the gamut from vodka and gin to fruit brandies and liqueurs to absinthe and Japanese-style single malt." At Audubon in Boston, the Patio Crusher ($13) mixes St. George Green Chile vodka, Aperol aperitif, fresh lemon juice, simple syrup, and Regans' No. 6 Orange bitters, and at Red Horse by David Burke in Rumson, New Jersey, former corporate mixologist Chris James' West Meets East ($16) features Baller Single Malt Whiskey, which is St. George's California take on Japanese whisky, Akashi-Tai Shiraume Ginjo Umeshu sake, Carpano Antica Formula sweet vermouth, and Angostura bitters.

"I love to use American craft spirits because so many of them are using innovative ways to create something different from what's been traditionally available for many years," says Al Thompson, bar director for the Washington D.C. venues Hanumanh and Thip Khao. "For so much of cocktail history Americans have taken what other countries have made—wine, vermouth, Cognac—and made them shine through cocktails. In this era, I think it's equally important to highlight all the wonderful American-made craft spirits in cocktails." He adds that he favors Barr Hill gin, which is produced by Caledonia Spirits in Montpelier, Vermont, and is unique for its base of locally sourced raw honey. At Thip Khao, his Waxing Gibbous ($15) comprises Barr Hill gin, dill-infused Dolin Génépy des Alpes liqueur, fresh lemon juice, housemade ginger mulberry syrup, and egg white. Also unique for its sourcing of local ingredients, Ocean Organic vodka from Hawaii is a brand Collins enjoys using at Lucky Rooster. "The distillery uses 30 species of Polynesian sugar cane and is desalinated with deep ocean mineral water off the Kona coast of the Big Island," she says. Her Pimento Lost in the Ocean ($14) blends Ocean Organic and Dolin Dry vermouth, garnished with pimento cheese-stuffed olives.

"I think the American craft spirits category is just going to continue to grow and the lines between spirits will blur as distillers keep pushing the limits and taking risks," Reading says. "Vodkas are no longer solely 'neutral grain spirits' as the category was defined before, but now encompass what could be considered unaged brandies or even rums. Aperitifs and digestifs aren't just Italian, Pisco doesn't only come from Peru or Chile, and even Japanese-style single malts are being created by American craft brands—and being created well. I think we'll see broadening categories and even new ones develop as American distillers continue to experiment, and with it will come a new wave of craft cocktails that push the boundaries of what we traditionally know both in flavor and technique." mw

Holiday Time

After last year's problems, retailers are hoping for a return to normalcy

BY CAROL WARD

2021 SPECIAL RELEASE
JACK DANIEL'S
SINGLE BARREL
Special Release
TENNESSEE WHISKEY

Many suppliers are releasing limited edition whiskies this year. Brown-Forman is offering Jack Daniel's Single Barrel Coy Hill High Proof.

Last year during the winter holidays, Bellevue, Kentucky retailer The Party Source was facing a conundrum. It had access to a range of allocated and hard-to-find Bourbons, but with the pandemic raging and social distancing practices in place, there wasn't an easy way to alert customers without risking a crowd at the store.

Party Source president Jon Stiles and his team came up with a new offering: allocated Bourbon baskets featuring Bourbons and other items in custom-made baskets. One basket included a 750-ml. of Eagle Rare Bourbon, a 750-ml. of W.L. Weller Wheated Bourbon, a bar towel, and a Bourbon-themed ceramic coaster, packaged in a bottle tote made from used Bourbon barrel staves and priced at $130. Other similar baskets were also available.

"We sold hundreds of them last year," Stiles says, noting that his store initially ordered 200 of the custom-made baskets. Once loaded with Bourbon and other goodies, the baskets sold out in three days. "We had to scramble," he says. "[The basket maker] ended up giving us as many as they could, but it certainly wasn't as many as we wanted."

At press time, Stiles and his team were planning to have even more available for immediate sale during this year's holiday season. Baskets will likely include Blanton's, Weller Antique, and Weller Full Proof, among other brands. "We're looking to include anything we feel we can get good quantities on," says Stiles.

The allocated Bourbon baskets are just one of several holiday-themed offerings in The Party Source's holiday catalogue, which offer holiday-centric selections along with favorites from The Party Source staff.

"These are our selections—it's not vendor driven," says Stiles, noting that holiday sales are crucial to any retailer's business. "We want to present the best things we have for our customers. We try to feature as many of our private barrels as possible. The Very Old St. Nick Bourbons were extremely popular last year and this year we managed to acquire a good size inventory, even more than we had last year."

Retailer Enthusiasm

The enthusiasm for the holidays as well as the eagerness to spotlight own labels and staff favorites is commonplace among beverage alcohol retailers who look to the winter holidays to drive a third or more of their annual sales. At Seattle's Metropolitan Market, wine, beer, spirits, and beverage specialist Mark Takagi is looking forward to the upcoming holiday season. "Champagne is a big deal and we bring in a container of our own label of Brut, Vintage, and rosé and merchandise along with all of the other notable houses like Louis Roederer, Veuve Cliquot, and others," he says. "We also have a selection of about 20 wines we call 'holiday picks' that have become a go-to favorite for our customers to shop from as they know all of these wines have been selectively curated by our wine staff for holiday fare and gatherings." Those wines are typically priced anywhere from $15-$80 per bottle.

Whisk(e)y is also a big favorite at Metropolitan Market. "We commit to a lot of exclusive barrels," Takagi says. "We also have an exclusive spirit from a local distillery that is a blend of rum, brandy, and whiskey that is recommended for eggnog—our dairy department secures an incredible, all natural eggnog—and works well in a number of other cocktails. That has become a tradition and customer favorite."

Gift baskets around the holidays and all year long are a staple at Wines & More locations in Massachusetts. Sara Walsh, director of merchandising and giftware for Wine &

PHOTO BY (OPPOSITE) KSENIYA OVCHINNIKOVA/GETTY IMAGES

As retailers prepare their stores for holiday shoppers, many turn to custom-made gift baskets, which offer guests a variety of options in a specialty package.

Spirits Retail Marketing, which franchises the stores, says she typically steers clear of holiday-centric or holiday-specific brands in her offerings, preferring instead to dress up baskets with packaging to match the season. But some baskets have an undeniable seasonal bent, such as the Winter Warmer ($40), which contains a 750-ml. of Smirnoff Vanilla Vodka, two nips each of 99 Peppermint and 99 Whipped Vodka, an assortment of cocoas, and a mug.

Retailer France 44 in Minneapolis also makes its own gift packs. "We'll assemble cocktail kits or mix-and-match beer baskets, focusing on local producers," says owner Rick Anderson. "People love it."

But unlike some other retailers, Anderson isn't too keen on the seasonal flavors that swarm the shelves during the holidays. "We'll buy a case or two of whatever flavor they've come up with for that season," he says, using Baileys as an example. "But we stick to the basics. We just do not see any real pull-through on the seasonal variations."

Value-Added Packaging

Anderson also isn't a big fan of the value-added packaging (VAP) that many suppliers use to add some excitement around their brand. "A lot of places like the VAPs; we don't," he says. "What we've found is that our customers don't really react to it."

In fact, the France 44 staff goes so far as to disassemble some of the packages that come through the door. "For certain liquor products, we can only get it in a VAP at certain times of the year," Anderson notes. "We actually take the effort to rip all the packages apart, we put the bottles on the shelves and then we have a section in the store where people can have the glassware for free."

Of course, other retailers desire such packaging as it creates enthusiasm among their customers. "Appropriate value-added packaging works any time," says Charles Sonnenberg, owner of Nashville-based Frugal MacDoogal, noting that the items must be "perceived as useful" and sold at no or nominal additional charge.

At Wine & Spirits Retail Marketing, Walsh is a big fan of VAPs, and she laments the fact that many brands have scaled back their efforts in recent years. "It's very pick-and-choose now, where it used to be that every brand under the sun had a gift set for the holidays," she says. "People love those because they pay the same retail. We try to get them when we can."

Stiles and his team also embrace VAPs around the holidays. "Our buyer is essentially buying as much as she can get her hands on because consumers really look for that," Stiles says. "They're very popular and a very big part of our business."

BENRIACH
SMOKE SEASON
SPEYSIDE SINGLE MALT SCOTCH WHISKY
DOUBLE CASK MATURED

Brown-Forman is releasing multiple limited edition whiskies for the holiday season, including Benriach (pictured) and Glendronach Scotches.

Supplier Efforts

Those kinds of sentiments are music to the ears for suppliers, who each year try to figure out how to position and package their brands for maximum holiday sales. Many view the holidays as a key time to influence a broader set of potential customers. "Holiday products, particularly VAPs, often provide additional retail visibility at a time when store traffic is at its peak," notes Erin Schlader, senior vice president and marketing director for the USA and Canada at Brown-Forman Corp. "These special branded packages present an opportunity to reach new consumers when purchased as a gift and to educate existing friends on creative ways to enjoy our premium brands."

Julie Cole, senior brand manager at Heaven Hill, shares a similar view. "The holiday season is an opportunity to showcase the personality of a brand through a seasonal flavor or engaging, interactive gift sets," she says. "It also gives consumers a simple, easy way to gift their favorite brands to friends and family, therefore expanding the recognition of the brand by both word of mouth and trial."

Pernod Ricard USA contends that more than 60% of adults have given alcohol as a gift during the holidays. That, and the fact that the winter holidays are the biggest selling season, is impetus to position brands for maximum exposure. "Having unique and holiday specific gifting items gives consumers a straightforward easy solution when at the point of purchase," says vice president of channel and shopper marketing Chris Hurley. "As we continue to see consumers looking to connect with their friends and family over special moments and holidays, these solutions and packages really help."

The Covid-19 pandemic, of course, upended holiday celebrations in 2020 but the overall sales for beverage alcohol retail improved in most venues as bars and restaurants remained shuttered. This year, the pandemic is still impacting the country and retail offerings are expected to resonate.

"While we saw a tremendous surge in the off-premise during Covid-19, we are still seeing strong sales in this channel even with our on-premise partners opening back up," says Hurley. "We feel that there is not a one size fits all approach to this year's holiday season. There is a high level of anticipation that consumers will be spending even more this season," he adds, noting a Bain Consulting report predicting holiday spending overall will rise 7% this year.

In fact, the pandemic could have spurred new consumer attitudes about home consumption. "It's a safe bet that much of the at-home toasting and celebrating will continue into the 2021 holiday season as, not only some uncertainty continues, but people continue to enjoy the moments they've gotten used to creating and sharing at home," says Guinness brand director Nikhil Shah.

The Line-Up

Holiday flavors and packaging run the gamut as brands of all sizes seek buy-in during the important winter holiday selling season. Diageo's Baileys brand has always capitalized on the holiday season. Brand director Stacey Cunningham says the Baileys trademark "is almost synonymous with the holidays, when treats and desserts are particularly important to celebrations at home with family and friends." This year, the brand is partnering with Dominique Ansel Bakery to create the Holiday Hot Chocolate Kit, which will feature all of the ingredients to make a "Tiger Striped Hot Chocolate," a mix of milk, dark and white chocolate ganache infused with the flavor of Baileys Original Irish Cream. Diageo is also relaunching Baileys Apple Pie Irish Cream Liqueur for a limited time, and offers a variety of other flavors seasonally or year-round.

Elsewhere in Diageo's portfolio, Cîroc recently released its Pomegranate expression as a limited-edition offering to bring a bit of luxury to festive occasions, such as Friendsgiving. Crown Royal is bringing back its limited-time package that includes a bottle of Crown Royal De Luxe and two premium rocks glasses. On the beer side, Guinness is bringing back its Guinness Gives Back pack for the second season.

The holiday offering has a charity component. "In addition to unique cans and imagery for eight cities, states, and regions, including a national version for the country, we're donating a dollar (up to $1 million) to organizations like the United Way, Pat Tillman Foundation, and several food banks across the country for each of these special Guinness Draught 8-packs we produce," says Shah.

Pernod Ricard is not staying away from gift offerings and VAPs for brands such as Perrier-Jouët (Belle Epoque gift box pictured), Kahlua, Absolut, and Martell.

Heaven Hill is strong in the VAP arena, with several brands packaged with add-ons. Elijah Craig Bourbon's gift set features a full 750-ml. Elijah Craig Small Batch and an Old Fashioned cocktail kit featuring Elijah Craig Old Fashioned Syrup. Larceny bourbon is packaged a premium gift set of a 750-ml. Small Batch with an etched, branded rocks glass and a branded flask.

For Deep Eddy Vodka, a gift set includes a 750-ml. Deep Eddy Original with one 50-ml. of each: Ruby Red, Lemon, and Lime. "The premium packaging features seasonal décor and the tagline 'Pick Something Real' highlighting the real fruit juice used in Deep Eddy flavors," notes Cole. Finally, Carolans Irish Cream is featuring a full 750-ml. bottle packaged with a branded ceramic mug for the holidays.

Among the many gift offerings within the Pernod Ricard portfolio are a Kahlúa With Absolut 50-ml. & Glass Gift; a Martell Blue Swift Glassware Set ($46), which includes Martell Blue Swift, a spirit drink made with VSOP Cognac matured in French oak casks and finished in Kentucky Bourbon barrels, and two limited edition glasses with gold etching; an Absolut vodka gift pack that includes a 750-ml. bottle of Absolut and 50-ml. bottles of Citron, Lime & Grapefruit; and Limited Edition Mischer Traxler and Perrier-Jouët Gift Boxes for Belle Epoque Brut 2013 ($165) and Belle Epoque Rosé 2013 ($305), among others.

Pernod Ricard is also bringing a personal touch to The Glenlivet during the holidays. The initiative allows consumers to create their own custom message that is printed on the front. "We know that approximately 60% of super premium spirits are actually for gifts, so it's imperative we stand out from our competitors during key gifting occasions," says Johnson. "We also know that personalization continues to trend and has become a key driver of choice when selecting a gift."

Limited-release whiskies are prevalent among many suppliers to take advantage of the gift-giving and indulgence season. That includes Brown-Forman. This month, the company is releasing its Jack Daniel's Single Barrel Coy Hill High Proof. Coy Hill is the highest hill on the Jack Daniel's Lynchburg, Tennessee property, where the barrel house re-exposes the whiskey to the most extreme elements. For those that collect high-abv offerings, this barrel proof offering won't disappoint at a range of 67.5%-75% abv.

In addition, Brown-Forman will release some extremely limited batch and cask releases from both the Glendronach and Benriach, along with its annual release of the Woodfood Reserve Master's Collection. The company will also feature three expressions (1897, 1920, and 1920) of its Old Forester Whiskey Row Series in a 375-ml. pack, among other releases and value-added packs. "Whiskey enthusiasts are now looking for these unique expressions each year, so it's been a lot of fun to observe the anticipation and dialogue about these releases on social media," Schlader says.

Customer interest isn't the only benefit. "Limited releases are often excellent opportunities to tell authentic brand stories, generate excitement, and showcase our production and innovation capabilities," Schlader says. "Overall, holiday offerings provide our premium portfolio visibility at a time when consumers are more actively shopping our category." mw

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Cellar Discoveries

Barrel-aged beers evolve thanks to innovation and abundance

Trends for barrel-aged beer at Idaho's two-unit Boise Co-Op Market seem to epitomize the overall developments for the category nationally. "We're seeing more items than ever before, in a much wider variety of sizes and package formats," says beer buyer Derek Bolton. "There's a growing number of barrel-aged stouts, porters, barley wines, and sours, and even occasional IPAs, ambers, and Scotch ales aged in barrels." To accommodate the expanding offerings, the stores dedicate an entire cooler door each to barrel-aged brews—about 50 SKUs in all—priced from $4 for a 16-ounce can to $60 for a 500-ml. bottle.

Retailers and brewers alike say that today's beer aficionados can't get enough of brews aged in wooden barrels and released in often limited quantities following months of anticipation. "Aging beer in a Bourbon barrel for a year is very similar to aging a fine wine or liquor in barrels," explains Sandy Anaokar, vice president of marketing at Founders Brewing, which has produced the KBS brand for nearly 20 years. "Not only does the Bourbon barrel help impart common flavor notes such as vanilla and caramel, it also imparts the oaky characteristic of the wood," she adds.

With a significant number of craft breweries now marketing barrel-aged brews, consumers have had easier access to the products in recent years than in the past. Some breweries, such as Founders, have been able to expand availability of their barrel-aged beers from limited releases to year-round offerings. And now, a plethora of used spirits barrels has helped fuel innovation within the segment, with beers aged in Tequila barrels among the more recent developments. "The continued interest in Tequila has allowed us to grow our product line to attract crossover consumers," says Anaokar, who notes that Founders introduced Tequila barrel-aged Mas Agave beers earlier this year.

Sourcing of barrels from well-regarded distilleries or brands is now often highlighted by beer marketers. Anheuser-Busch InBev's 2021 Goose Island Bourbon County stout, for example, to be released later this month, employed barrels from Heaven Hill, Wild Turkey, and Buffalo Trace, while the Bourbon County Reserve Blanton's stout was aged for 18 months in Blanton's Original Single Barrel Bourbon barrels. Cocktail-inspired barrel-aged brews are also trending, such as Firestone Walker Brewing's recently unveiled Tequila Sunrise and Mezcal Limon offerings as part of its vintage series.

A shift away from traditional large-format bottles to smaller packages has been particularly noticeable in the barrel-aged beer space. Surly Brewing released barrel aged variants to its popular Darkness Russian imperial stout in 16-ounce cans last year, and according to vice president of marketing Bill Manley, consumer response was very positive. "They disappeared quickly from the shelves," he says. Manley and others note that for many consumers, the smaller packages are easier on their wallets than 750-ml. or 22-ounce bottles. "They're easier to take a risk on," he says.

Goose Island Beer Co. president Todd Ahsmann notes that while the pandemic impacted on-premise sales of barrel-aged beers, off-premise sales were strong as consumers worked through their personal beer cellars. "Last year's Bourbon County release proved demand is stronger than ever," he says, noting that some retailers sold out in record time. Overall, though, Ahsmann concedes that with the proliferation of barrel-aged beers, "the shining star of some classic producers has waned as others grow." Laz Luis, the beer director at New Jersey's Sparrow Wine & Liquor Co., agrees. "In the past, I would have to hide new releases, but today, barrel-aged beers aren't selling like they used to," the retailer says. He attributes the slowdown to the popularity of hard seltzers and RTDs.

As barrel-aged brews rise in popularity, breweries like Goose Island Brewing Co. (lineup pictured) are partnering with well-known distilleries like Heaven Hill and Wild Turkey to age their offerings.

While the barrel-aged beer category has evolved in recent years, retailers like Bolton believe that the changes can only help the segment. "With so many talented brewers out there, there will be no shortage of unique and creative takes on barrel aging," he says. "And with alternative packaging emerging, the category is becoming more accessible to everyone. For me, that's something to look forward to." mw

Terri Allan

Off-Premise News:

Doordash Adds 21 New Markets

San Francisco-based e-commerce platform Doordash has added alcohol delivery in 21 markets across the U.S. In addition to placing orders from liquor stores, Doordash's platform will allow users to order alcohol for delivery from grocery stores, restaurants, and convenience stores, where legal. The service kicks off with roughly 30,000 SKUs listed on the Doordash Marketplace. Previously, Doordash only offered alcohol delivery through its Drive program, which required restaurants and retailers to accept orders through their own websites with orders fulfilled by Doordash gig workers.

On-Premise News:

Boston Beer To Open Truly Taproom

The Boston Beer Company has announced a new Los Angeles taproom for Truly Hard Seltzer, set to open in early 2022. The location, a first for the brand, features 8,000 square feet with indoor and outdoor space for up to 350 guests. With 12 available taps, the location will showcase existing and exclusive flavors of Truly Hard Seltzer alongside small bites and will serve as an event space to feature local comedy, music, and art. While Truly continues to perform well in the hard seltzer market, the company recently had to adjust its guidance for the year, with Truly's growth now expected to be more muted than in prior years.

Other Half Brewing Opens New Beer Garden

New York's Other Half Brewing has opened a new beer garden in Manhattan at Rockefeller Center. The new location will initially operate as a seasonal beer garden before the brewery's indoor taproom opens later in the fall. Other Half at Rockefeller Center will serve a variety of Other Half beers from the company's Brooklyn, Washington, D.C., and Finger Lakes, New York breweries alongside Oh2 Seltzer, a selection of ciders, and, eventually, a cocktail program. The beer garden, which has seating for 50, will be open on Thursday and Fridays from 2 P.M.-8 P.M. and on Saturdays from 12 P.M.-8 P.M.

Smothers Park Brewpub To Open In 2022

Goodwood Brewing and Spirit's newest brewpub will be opening in early 2022 near Smothers Park in Owensboro, Kentucky. Goodwood Owensboro will feature a full kitchen and brewery onsite, showcasing Goodwood's core beers, craft spirits, and seasonal brews. Headquartered in Louisville, Goodwood operates restaurants in Louisville, Lexington, and Frankfort, Kentucky, as well Indianapolis. It distributes its beers to 12 states and its spirits to four states.

Distributor News:

LibDib Expands To Eighth State

Online distributor LibDib has expanded into the Connecticut market, its eighth state, joining California, Colorado, Florida, Illinois, New York, Texas, and Wisconsin. Producers can sign up on LibDib's website or app for distribution in Connecticut now, and web and app-based purchasing by restaurants, bars and retailers will be available soon. LibDib is partnered with Republic National Distributing Co. (RNDC), and in addition to entering Connecticut recently launched LibDib@RNDC TX, a new sales division at RNDC within the state of Texas. The new joint model provides a distribution option for both established RNDC suppliers as well as new and emerging brands, according to the companies.

Heidelberg Distributing Purchased By Maryland Firm

Maryland's Redwood Capital Investments has acquired Ohio's Heidelberg Distributing for an undisclosed sum. The acquisition will give Redwood a footprint in Ohio and Kentucky, where Heidelberg has over 1,600 employees and 26,000 accounts, delivering drinks from over 700 suppliers, including Treasury Wine Estates, Constellation, Delicato, The Wine Group, Sazerac, and Pernod Ricard among others. Redwood also owns Anheuser-Busch distributors in Florida and Texas, as well as an interest in Illinois' Lakeshore Beverage.

RNDC Establishes Certificate Program At FSU

Republic National Distributing Co. (RNDC) has donated $500,000 to Florida State University's Dedman College of Hospitality. The donation establishes the RNDC Certificate of Beverage Management, designed for individuals pursuing careers in beverage management, with a primary emphasis on sales and service within the hospitality and tourism industries. RNDC's gift will create an endowment to maintain comprehensive, high-level programming for those preparing to enter the beverage industry, while also supporting the recruitment and retention of faculty at the school.

Gold Coast Acquires Rights From Brown Distributing

Gold Coast Beverage, LLC, a Reyes Beer Division company, has acquired certain distribution rights from Brown Distributing in Southern Florida. This acquisition includes brands from key craft suppliers such as Funky Buddha, Bucanero USA, Cigar City, Dogfish Head, Florida Keys, and Anheuser-Busch's Wynwood Brewing Company, and will add approximately 1.1 million cases to Gold Coast Beverage's existing operations. Reyes Beer Division delivers 260 million cases annually to over 100,000 retail accounts across the country. It's part of food and beverage distribution giant Reyes Holdings, which has annual sales exceeding $30 billion.

Supplier News—Spirits:

Pernod Partners On Agriculture Initiative

Pernod Ricard has partnered with the International Union for Conservation of Nature (IUCN) on its new Agriculture and Land Health Initiative. Coinciding with the IUCN World Conservation Congress currently taking place in Marseille, Pernod Ricard is the first corporate partner of the initiative, which is working on a shared vision for sustainable agriculture involving governments, NGOs, businesses, land management experts, and scientists. The partnership builds on other environmental initiatives from Pernod, including its 2030 Sustainability and Responsibility roadmap.

Brown-Forman Announces Global Sustainability Goals

Brown-Forman has published updated global sustainability goals, broadening their focus. The goals extend beyond the company's own direct business operations to include its supply chain, where it says the majority of its environmental impact resides. Brown-Forman's plan of action centers around reducing greenhouse gas emissions, water stewardship, establishing a zero-waste company economy, and supply chain improvements including reducing the environmental impact of packaging and conserving hardwood forests used in barrel-making. The company hopes to cut its greenhouse gas emissions in half by 2030 as well as use all renewable electricity and offer all recyclable/reusable primary packaging; it hopes to achieve net-zero greenhouse gas emissions by 2045.

Pernod Ricard Leads Campaign Against Hate Speech

As the digital advertising landscape continues to evolve, Pernod Ricard North America chairman and CEO Ann Mukherjee is among the prominent marketers leading an effort to fight hate speech across online platforms. Last year, Pernod unveiled the #EngageResponsibly effort with a campaign on Twitter, Instagram and Facebook, calling on advertisers and social media companies to set new standards for more responsible online advertising. Now that push is being expanded in partnership with advertising industry leaders the Association of National Advertisers (ANA) and the Global Alliance for Responsible Media (GARM).

Mukherjee and Ivan Pollard, former General Mills CMO, are serving as co-chairs of #EngageResponsibly as it looks to amplify its message in collaboration with partners like Facebook, TikTok, YouTube, Twitter, and Snap. The ANA and GARM will be asking companies to sign a pledge to provide support for the effort and tangible actions to combat online hate speech, including responsible social media dialogue and behaviors and the use of social platforms' tools for reporting online hate speech incidents.

Diageo To Invest $500 Million In Tequila Production

Diageo is set to invest $500 million in its Tequila production facilities in Mexico to help meet surging demand. Alvaro Cardenas, president of Diageo's Latin America and Caribbean region, said the drinks giant will use the outlay to open its third local facility in La Barca, Jalisco, calling the move the most significant investment the company has made in the Latin America and Caribbean region in a decade. Diageo's Don Julio and Casamigos Tequila brands continue to surge, and the company sees ample room for further growth looking ahead as more consumers gravitate to the category.

Aviation Gin Partners With NFL

Diageo's Aviation gin has announced a new partnership with the NFL and will be featured as an official sponsor of the league beginning with the upcoming football season. The multiyear partnership will feature digital, social, and broadcast content, alongside on- and off-premise tastings, and the American Mule cocktail, an Aviation-centric take on the Moscow Mule. Last year, Aviation reached 86,000 cases in the U.S., according to Impact Databank.

Absolut Vodka Gets Bottle Makeover

Pernod Ricard has given Absolut vodka a new look aimed at underscoring the brand's provenance, authenticity, and craftsmanship credentials. Billed as the biggest update to the brand since 1979, the makeover calls out Absolut's "One Source" philosophy, reinforcing the fact that every bottle is produced and distilled in and around Åhus, Sweden, enhances the legibility of the bottle's script, invites consumers to visit its brand home at the original distillery, and embosses the glass with "Country of Sweden" to further emphasize its heritage.

Martell Cognac And Janelle Monáe Launch New Campaign

Martell Cognac has partnered with artist Janelle Monáe on a new campaign called "Soar Beyond the Expected." With the campaign's creative featuring Monáe, "Soar Beyond the Expected" focuses on Martell's Blue Swift offering, made of VSOP Cognac matured in French oak casks and finished in Kentucky Bourbon barrels. Monáe is cast as the lead "Standout Swift," encouraging consumers "to be unapologetically themselves and create their own path," according to the company. Part of the Pernod Ricard stable, Martell had U.S. volume of 174,000 cases last year, according to Impact Databank. The brand soared by 59% in control states in the year-to-date through July.

Belvedere Opens New Biomass Capture Facility

Moët Hennessy-owned Belvedere has opened a new biomass capture facility on-site at its distillery in Poland. The new facility will start producing 100% renewable energy, and subsequently reduce Belvedere's energy related CO2

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emissions by 95% by 2022. Additionally, in line with its Made With Nature platform, Belvedere has set goals to transition to being fully organic beginning in 2023, reduce use of plastic by 50% by 2025, and reduce wasted water disposal by 40% by 2025, among other environmental measures.

Diageo Launches Campaign For Crown Royal RTDs

Diageo is backing Crown Royal's RTD cocktails with a new campaign called "A Whole New World of Cocktails." The push centers on an ad showcasing a range of places and spaces to enjoy RTD concoctions such as Crown Royal's Washington Apple, Whisky & Cola, and Peach Tea cocktails, which debuted earlier this year and sell in 4-packs of 12-ounce cans and as individual cans, priced at around $15 and $4, respectively. Running across digital, social, and OOH channels, the ad features Toronto-based hip-hop artist DijahSB and professional gamer Erin Ashley Simon, and will be supported by an immersive experiential platform.

Pernod Ricard Acquires The Whiskey Exchange

Pernod Ricard has agreed to acquire U.K. retailer The Whisky Exchange in a move that will bolster its e-commerce business. Financials weren't disclosed. Founded by Sukhinder and Rajbir Singh in 1999, The Whisky Exchange carries over 10,000 products and is known for its online shop as well as three brick-and-mortar locations in London at Covent Garden, Great Portland Street, and London Bridge.

Pernod said the deal is in line with its "consumer-centric strategy of meeting new consumer needs and expectations, in a context of solid e-commerce growth and strong demand for premiumization." Chairman and CEO Alexandre Ricard called the Singhs pioneers of the online sales space, noting that "E-commerce is a key channel in our long term strategy."

The Whisky Exchange's parent company had sales of nearly $100 million last year, Bloomberg reported. Its catalogue features more than 4,000 whiskies of various kinds, and reaches 30 countries. In addition to the e-commerce and physical retail footprint, Pernod will be able to leverage The Whisky Exchange's real-time data on categories and specific brands.

The Whisky Exchange will continue to operate with its current team and structure, with Sukhinder and Rajbir Singh managing the business as joint managing directors.The acquisition is subject to customary closing conditions.

The Balvenie Partners With Questlove

The Balvenie, part of the William Grant & Sons portfolio, has partnered with musician and author Questlove on a new digital series called Quest for Craft. Hosted by Questlove and filmed in the historic Electric Lady studios, it features creative minds like Grammy-winning music producer Jimmy Jam, SNL comedian Michael Che, punk-rock icon Patti Smith, and prolific author Malcolm Gladwell. The Balvenie and Questlove are also launching a scholarship program with the University of the Arts, Philadelphia, which will "give one aspiring creative mind, from anywhere in the United States, the opportunity to undertake the university's 'first-of-its-kind' Ph.D. in Creativity."

MGP Consolidates Brand business

Following its $475 million purchase of Luxco earlier this year, MGP Ingredients is now consolidating its branded business—including labels like George Remus and Rossville Union—under the Luxco name. Additionally, MGP's 174-year-old Indiana distillery, formerly owned by Seagram and Pernod Ricard respectively, will now be known as Ross & Squibb Distillery in relation to its branded production. The new name pays tribute to two historic Lawrenceburg distilleries: Ross, from George Ross, original founder of Rossville Distillery, which was located on the same campus; and Squibb, from the distillery purchased by George Remus in 1921. The rebrand unites the two labels in Indiana distilling history, according to the company. For its sizable contract production, the Indiana distillery will continue to be known under its current moniker of MGPI of Indiana, LLC.

Johnnie Walker To Launch New TV Campaign

Johnnie Walker is launching a new TV and digital push under its long-running Keep Walking campaign. Intended to "get people back on their feet and moving again," the ad features an "anthem" including samples of songs such as Run DMC and Aerosmith's "Walk this Way," Loretta Lynn's version of the iconic "These Boots Are Made for Walking," and Lou Reed's 1970s' classic "Walk on the Wild Side." The initiative will also include ads across city skylines and cultural hotspots around the world, featuring quotes from Grace Jones, Mark Twain, and Ayrton Senna in New York City, Mexico City, Cape Town, Tokyo, and Bangkok, among others.

Stoli Taps Mandell To Oversee New Distillery

Bardstown Bourbon Co. co-founder David Mandell has been tapped by Stoli Group to oversee construction and development of the 400-acre Kentucky Owl Distillery and Park in Bardstown, Kentucky. Mandell, who remains a shareholder in Bardstown Bourbon Co., was instrumental in developing that company's distillery, Bourbon brands, full-service restaurant and bar, and visitors center. In his new role, he's charged with guiding Stoli's ambitious agenda for Kentucky Owl, which is known for luxury-end whiskies and recently extended with The Wise Man, a 45.4% abv Bourbon retailing at $60.

Willian Grant & Sons Donates Rare Lots

William Grant & Sons, through its Private Clients business, has donated three extremely rare lots to the upcoming Distillers One of One auction, benefiting Scottish charities. The first, Glenfiddich: The 1950s, consists of four whiskies—distilled in 1955, 1957, 1958, and 1959—bottled in crystal decanters and housed in a cabinet made by the Queen's royal warrant holding cabinet maker, NEJ Stevenson. William Grant has also donated Ladyburn 1966 David Bailey one-off John Lennon Edition, a single bottle featuring a portrait of the Beatle. Finally, the company contributed The Balvenie 1964 Single Bottle Release, bottled in a crystal decanter with a handmade calligraphic label. The six bottles are expected to fetch at least £285,000 (about $387,000) at the auction, created by the Worshipful Company of Distillers.

Supplier News—Wine:

Quintessential Adds To Portfolio

Napa Valley-based importer and marketer Quintessential is adding Bordeaux's Maison Bouey to its portfolio. Maison Bouey owns 70 hectares (173 acres) of vineyards in the Medoc, planted mostly to Merlot, Cabernet Sauvignon, Malbec, and Petit Verdot. Beginning in November, Quintessential will import wines from Bouey's Cuvee line, as well as Les Parcelles N°8, Maison Blanche (AOP Bordeaux), Colors 72, and Chateau La France Delhomme. Retail prices range from $13-$40.

Jacky Lorenzetti Purchases Château Lafon-Rochet

French-Swiss real-estate investor Jacky Lorenzetti has purchased Bordeaux's Château Lafon-Rochet from the Tesseron family for an undisclosed sum. The St.-Estèphe fourth-growth is Lorenzetti's fourth classified growth in Bordeaux's Médoc region. "When you have already invested in St.-Estèphe and Pauillac, and a bank offers you an opportunity to buy an estate like Lafon-Rochet, you don't say 'no,'"said Emmanuel Cruse, the general manager of Lorenzetti's estates and co-owner of Château d'Issan with his siblings and Lorenzetti.

Merryvale Acquires Lampyridae Vinyards

Merryvale Vineyards proprietor René Schlatter has announced the acquisition of Lampyridae Vineyards on Mt. Veeder, a high-elevation site featuring Cabernet Sauvignon, Cabernet Franc, Zinfandel, Syrah, and Grenache on 13 planted acres. The price was undisclosed. With this purchase, Merryvale increases their total estate vineyard holdings to 76 planted acres across three properties and three Napa Valley AVAs. Merryvale has a sales and marketing partnership with Pacific Highway Wines.

Marchesi di Frescobaldi Acquires Corte alla Flora

Marchesi di Frescobaldi has added another estate to its Tuscany portfolio, buying Corte alla Flora in Montepulciano. The purchase price was not disclosed. The owner, Sergio Cragnotti, a businessman from Rome and former owner of the Società Sportiva Lazio, the most famous soccer team in Lazio, decided to retire and contacted Marchesi de' Frescobaldi president Lamberto Frescobaldi.

Located in the Cervognano zone of Montepulciano, one of its best areas, the property, which makes about 23,000 cases a year, consists of 148 acres, of which 75 acres are planted to Sangiovese, Merlot, Cabernet Sauvignon, Pugnitello, and Petit Verdot.

Bledsoe McDaniels Acquires New 80-Acre Vineyard

Bledsoe McDaniels Winery, led by former NFL quarterback Drew Bledsoe and current NFL coach Josh McDaniels, has acquired an 80-acre vineyard in Oregon's Willamette Valley for an undisclosed sum. Located in the Eola-Amity Hills AVA, the vineyard has volcanic and sedimentary soils and is planted with 29 acres of Pinot Noir, Chardonnay, and a small amount of Chenin Blanc. It was previously owned by Mimi Casteel of Hope Well Winery, whose parents Ted Casteel and Pat Dudley, founders of Bethel Heights Vineyards, helped pioneer wine production in the region in the 1970s. In addition to the vineyard, the site may also host Bledsoe McDaniels production and hospitality facilities in the future.

Tenute del Mondo Takes Stake In Chateau Miraval

Stoli Group subsidiary Tenute del Mondo has acquired a 50% stake in Provence winery Chateau Miraval from actress Angelina Jolie for an undisclosed sum. That makes the drinks group a 50/50 partner with actor Brad Pitt, Jolie's ex-husband and former partner in the winery.

Miraval, which is handled by Vineyard Brands in the U.S., recently earned an Impact "Hot Prospect" award after rising 17.4% to just under 150,000 cases in the U.S. market last year. The chateau in Correns, France sits on 400 hectares (988 acres) and was acquired by Pitt and Jolie in 2012 for an estimated $60 million. It was said to be worth about €140 million ($162 million) currently.

Tenute del Mondo now adds the 50% interest in Miraval to its existing holdings. The company owns Argentina's Achaval Ferrer and Spain's Arínzano, and is also co-owner (with the Frescobaldi family) of Italian icons Masseto, Ornellaia, Luce, and CastelGiocondo. Stoli Group CEO Damian McKinney said the company has long admired the Miraval brand, adding, "We are thrilled to have a position alongside Brad Pitt as curators of their extraordinary vintages."

Domaine Serene Partners With Portland Trail Blazers

Oregon's Domaine Serene has forged a partnership with the NBA's Portland Trail Blazers beginning with the upcoming 2021-2022 season. In addition to being recognized at the Trail Blazers' "Luxury Wine of Choice," Domaine Serene is launching a new 7,500 square-foot hospitality area in the Moda Center, the Domaine Serene Wine Studios. That space will showcase large-format bottles, winery and vineyard photography, and player-signed bottles and jerseys, while featuring premier views of the Moda Center court. Domaine Serene's Oregon Pinot Noirs, Chardonnay, and Rosé will also be available by-the-glass and by-the-bottle to guests in all luxury suites at the arena.

Supplier News—Beer:

Diageo Beer Developing Chicago Guinness Location

Diageo Beer Co. USA is planning to develop a new Guinness brewery, restaurant and pub in Chicago's Fulton Market neighborhood, targeting early 2023 for the opening. The Chicago Tribune reported that the 15,000-square-foot space will include a 10-barrel brewing system and feature a variety of beers made on-site as well as Irish pub fare. With the new Chicago outpost, Diageo is looking to replicate the success of its Guinness Open Gate brewery and pub in Baltimore, which opened in 2018 on a $90 million investment.

Stone Brewing Expands Distributing Business

Escondido, California-based Stone Brewing's distribution unit Stone Distributing Co. has added four new partners to its portfolio. The first is Bomani Cold Buzz, a 5.7% abv cold brew coffee brand that comes in regular coffee and vanilla flavors. It's also partnered with Inglewood, California-based Crowns & Hops Brewing Co., taking full distribution rights following a temporary relationship that began last year. Third is Tarantula Hill Brewing Co., whose lead and master brewer are both Stone alumni and which is now expanding distribution. Finally, Stone will distribute Villager Spirits' line of canned cocktails, which include Tequila Paloma, Vodka Mule, Mai Tai, and multiple flavors of Margarita. Other Stone Distributing partners include Societe Brewing, Jiant Hard Kombucha, and Spindrift Spiked. Stone CEO Maria Stipp says the distribution business is currently up 11% in the year-to-date.

Cannabis News:

Constellation Announces CBD Product

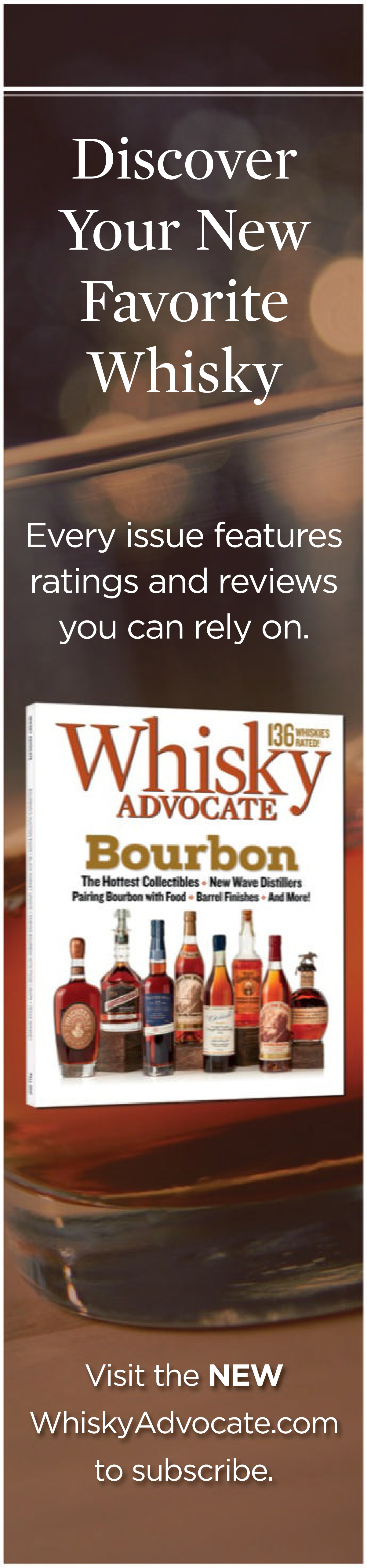
Constellation Brands is introducing its first CBD product, Karma CBD Water. The beverage is infused with 25mg of CBD distillate an 18-ounce bottle, plus four adaptogens and seven essential vitamins "to deliver a full entourage effect to support holistic health," according to the company, which developed the product by leveraging its stake in Canadian cannabis group Canopy Growth. Karma CBD Water will be available in five natural flavors: Cranberry Lime, Blueberry Yuzu, Blood Orange Papaya, Lavender Orange and Watermelon Dragonfruit. It's debuting online as well as in retail stores nationwide. Karma's CBD Water lineup will be distributed through Constellation's beer distribution network.

Vertical Wellness Partners With Just Live

Vertical Wellness, the CBD company headed by drinks industry veteran Smoke Wallin, is launching a CBD sparkling water in partnership with Just Live and CanaFarma. Just Live, which targets athletes and fitness enthusiasts with its products, is partnered on an eponymous line of CBD sparkling water that will include the flavors Meyer Lemon, Cran-Raspberry, Lime with Mint, Clementine, Mixed Berry, and Grapefruit. Each serving contains 25-mg. of CBD for a non-intoxicating effect. The line will be launching in select markets nationwide.

Acreage Holdings Sells Oregon Dispensaries

Acreage Holdings is selling off its four Cannabliss dispensaries in the Oregon market to Chalice Brands Ltd. for $6.5 million. Acreage says the deal is part of its strategy to focus in on its core markets. "Acreage remains focused on our three key strategic objectives—driving profitability,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strengthening our balance sheet, and accelerating our growth in our core markets," says CEO Peter Caldini. Based in New York, Acreage is known for The Botanist retail brand, Tweed cannabis from partner Canopy Growth, the Innocent edibles brand, and the Prime medical brand in Pennsylvania.

Tilray Closes Nanaimo Facility

Tilray is closing its former flagship facility in Nanaimo, British Columbia as it looks to cut costs following its merger with Aphria. The plant will be shut down in phases with the process expected to be completed next spring. Tilray will look to shift some workers from Nanaimo to its Broken Coast cultivation facility on Vancouver Island. Canada-based Tilray completed its merger with Aphria in May, and last month agreed to take a 21% stake in U.S. player MedMen. Tilray CEO Irwin Simon recently said the company is targeting $4 billion in sales by the end of its 2024 fiscal year.

Breakthru Beverage Expands CBD Portfolio

Breakthru Beverage Group is expanding its CBD stable with the Sprig and Cloud Water brands. Breakthru will handle both brands in Arizona, Colorado, Florida, Illinois, Virginia, and Connecticut. Newport Beach, California-based Sprig is a sparkling CBD-infused range of beverages including Citrus Original, Citrus Zero Sugar, Melon Zero Sugar and Lemon Tea Zero Sugar, with each containing 20-mg. of hemp CBD a 12-ounce can, and retailing at $60 a 12-pack.

Cresco Labs Purchases New Dispensaries

Cresco Labs is adding three new dispensaries in Pennsylvania. The stores do business under the name Cure Penn and are located in Philadelphia, Lancaster, and Phoenixville. Cresco Labs will pay $90 million for Cure Penn in an undisclosed mix of cash and stock, with the transaction expected to close in the last quarter of this year. The acquisition will bolster Cresco's presence in Pennsylvania's robust medical market, where the company already operates four dispensaries under its Sunnyside retail brand.

Jushi Holdings Expands In Nevada Market

Boca Raton, Florida-based Jushi Holdings is expanding its presence in Nevada. The multi-state operator will acquire a dispensary in Las Vegas doing business under the name The Apothecarium. That name may ring a bell as the line of upscale retail locations owned and operated by TerrAscend in the San Francisco Bay area and elsewhere—in this case the name is used under license with an affiliate of TerrAscend. The storefront adds to Jushi's April acquisition of cultivation, processing, and distribution licenses in Nevada, making it the company's fourth vertically integrated market along with Pennsylvania, Virginia, and Massachusetts.

Kaló Launches THC Seltzers

Pequannock, New Jersey-based Kaló is launching a line of THC seltzers in Maine. The company, which previously released a line of non-psychoactive hemp-infused seltzers in New Jersey, has partnered with Novel Beverage Co. to distribute the new THC seltzers to the 30-plus recreational dispensaries currently open in Maine. Each 12-ounce bottle of Kaló contains 5-mg. of THC and is available in Lemon Lavender and Pomegranate Peach flavors. The company plans to expand distribution to Massachusetts and other markets in the coming months.

RNDC Adds Unity To CBD Stable

Republic National Distributing Co. (RNDC) has added the Unity brand to its CBD beverage portfolio. Infused with 30-mg. of CBD as well as adaptogens such as Ashwagandha, Rhodiola Rosea, and Ginkgo Biloba, each 14-ounce bottle has 30 calories and 7 grams of sugar. Flavors include Blueberry Lavender, Strawberry Lemonade, Blood Orange Hibiscus, Elderflower Rose, Ginger Lemonade, and Blackberry Tea. Unity is currently in 1,500 stores since launching 18 months ago, and will now look to scale further through RNDC's network.

Canopy Purchases Wana Brands

Canada's Canopy Growth Corp has agreed to purchase Colorado-based edibles maker Wana Brands for $297.5 million, contingent upon federal legalization of cannabis in the U.S. Wana claims to be the U.S. market leader in the edibles category, and is known for its cannabis gummies, which sell in a variety of flavors and strengths, including options like Appletini Hybrid, Colorado Sunrise Sativa, and Island Punch Indica, with a 10-pack of gummies each with 10-mg. THC retailing at around $17.

Wana produces and sells edibles itself in its home base of Colorado, and has license agreements across a dozen states, plus Canada, with plans to be present in 20 states by the end of next year. "Acquiring the No.-1 cannabis edibles brand in North America will serve to strengthen our market position in both Canada and the United States," says Canopy CEO David Klein. "The right to acquire Wana secures another major, direct pathway into the U.S. THC market upon federal permissibility, and in Canada we'll be adding the top-ranked cannabinoid gummies to our industry-leading house of brands."

The gummies category has emerged as a fast-growing segment in both the U.S. and Canada, accounting for more than 71% of all edibles purchased, according to Headset data. Canopy says it expects edibles to continue serving as "a primary entry point for new consumers into the THC category."

The proposed deal for Wana mirrors a similar arrangement Canopy has in place to acquire U.S. multi-state operator Acreage Holdings upon federal legalization. Unless and until Canopy exercises

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its right to acquire Wana, it will have no economic or voting interest in the Colorado company, which will continue to operate independently.

Petalfast Adds Emerald Sky To Portfolio

Irvine, California-based cannabis sales and marketing agency Petalfast has added Emerald Sky Edibles to its portfolio. Emerald Sky was founded in 2018 and its products are currently available in over 400 dispensaries throughout California. Its product line includes gummies, licorice, fruit drops, peanut butter cups, and creme filled chocolate cookies.

PharmaCann Merges With LiveWell

Chicago-based PharmaCann is merging with Colorado-based LivWell Enlightened Health. PharmaCann claims to be the largest privately held and vertically integrated cannabis company in the U.S. with operations in Maryland, Illinois, Massachusetts, New York, Ohio, and Pennsylvania and produces the Matter cannabis brand. LivWell has been in business since 2009 and operates in Michigan as well as its home state. PharmaCann will absorb LivWell under the terms of the merger agreement; once complete the company will operate approximately 60 dispensaries and 11 cultivation facilities across eight states. LivWell's CEO John Lord will join PharmaCann's board of directors as well. Financial terms were not disclosed.

Cresco Labs To Acquire Laurel Harvest

Cresco Labs is deepening its holdings in Pennsylvania. The Chicago-based producer will execute a definitive agreement to acquire Laurel Harvest Labs for $80 million. The company's assets include a 52,000 square foot cultivation facility in Lancaster County, early construction on an additional 52,000 square feet, an operational dispensary in Montgomeryville, a second retail location under construction in Scranton, and licenses for four additional locations. The move follows a similar investment by Cresco Labs last month when it paid $90 million for three Cure Penn medical dispensaries in the state. The Laurel Harvest transaction will be completed on a cash-free, debt-free basis and is expected to close by the end of the year, pending approval.

Legal News:

Supreme Court Declines To Hear Wine Shipping Case

Should consumers have the right to buy wine from retailers in other states? The U.S. Supreme Court recently announced that it won't decide—at least not in this session—declining to hear Sarasota Wine Market v. Schmitt. A Supreme Court decision on the case, which challenged Missouri's law prohibiting out-of-state wine retailers from shipping orders to consumers in Missouri, could have potentially reshaped the U.S. wine sales landscape.

This is one of several recent challenges to laws prohibiting out-of-state retailer direct shipping. In this particular case, a Florida wine store, Sarasota Wine Market, and Missouri consumers sought to overturn Missouri's law as unconstitutional, in violation of the Constitution's Commerce Clause, which forbids states from discriminating against or interfering with interstate commerce.

This past February, the U.S. Court of Appeals for the 8th Circuit ruled against the plaintiffs, determining that Missouri's out-of-state direct-shipping ban was protected under the 21st Amendment. (The Supreme Court has held that states' rights granted by the 21st Amendment can preempt the Commerce Clause, for laws enacted to discourage excessive drinking or create an orderly alcohol market.) Attorneys Alex Tanford and Robert Epstein, who previously worked on Sarasota in the 6th and 8th circuits (and were also lawyers on the landmark Granholm v. Heald decision in 2005), appealed the 8th Circuit decision, filing a petition for writ of certiorari (cert) in June with the Supreme Court.

CA Approves Cocktails To-Go

California's legislature has approved cocktails-to-go privileges for restaurants through 2026, and Governor Gavin Newsom has signed the bill into law. The measure will leave bars that don't serve food out of the mix, however, owing to a stipulation mandating that to-go drinks "shall be sold in conjunction with a bona fide meal, and shall be limited to two such drinks per bona fide meal." According to the Distilled Spirits Council of the U.S., 16 states and Washington, D.C. have now passed legislation to make cocktails to-go permanent, and 14 other states passed legislation to allow cocktails to-go on a temporary basis.

The Editors

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Southern Glazer's Wine & Spirits has named **Mark Chaplin** as senior vice president, sales and marketing, reporting directly to Gene Sullivan, chief sales and marketing officer. Chaplin will now assume the leadership role of Southern Glazer's corporate supplier management team, which serves as national brand managers for key strategic suppliers. Additionally, **Zachary Poelma** has been promoted to the role of senior vice president, supplier strategy, reporting directly to Sullivan and working with Chaplin on "embedding a supplier-centric approach" across supplier strategy, insights, and other supplier support functions, according to the company.

Industry veteran **Nicole Carter** has been named president of Roederer USA's California wineries, covering 700 acres across the Anderson Valley, Sonoma, and Napa Valley. Carter had previously been president of two of those wineries, Merry Edwards (Russian River Valley) and Diamond Creek (Napa Valley). Now she'll add responsibility for Roederer Estate, Scharffenberger Cellars and Domaine Anderson, all located in the Anderson Valley. Carter reports to Guillaume Fouilleron, head of Roederer's U.S. operations.

France's Bollinger family has appointed industry veteran **Jean-Baptiste Rivail** as CEO of Ponzi Vineyards, the Oregon-based winery the family acquired for an undisclosed sum last year. Rivail will also serve as executive vice president of the Bollingers' SJB USA, charged with further developing French wine brands Champagne Bollinger, Champagne Ayala, Domaine Chanson, and Langlois-Chateau in the U.S. market. Rivail was most recently general manager of LVMH's Newton Vineyards in the Napa Valley.

Anheuser-Busch InBev (A-B InBev) announced a number of changes to its management team in the U.S. **Kyle Norrington**, currently president of Labatt in Canada, has been appointed as U.S. chief commercial officer to oversee sales and marketing. Prior to running Labatt, Norrington was based in New York, overseeing global brands from A-B InBev. **Simon Wuestenberg**, currently president of the company's distribution unit A-B One, will become U.S. chief sales officer. Current CMO **Marcel Marcondes** is transitioning to a yet-to-be-announced new role; he will be replaced by **Benoit Garbe**, who is currently Anheuser-Busch's U.S. chief strategy officer.

Mark Chaplin

Nicole Carter

Jean-Baptiste Rivail

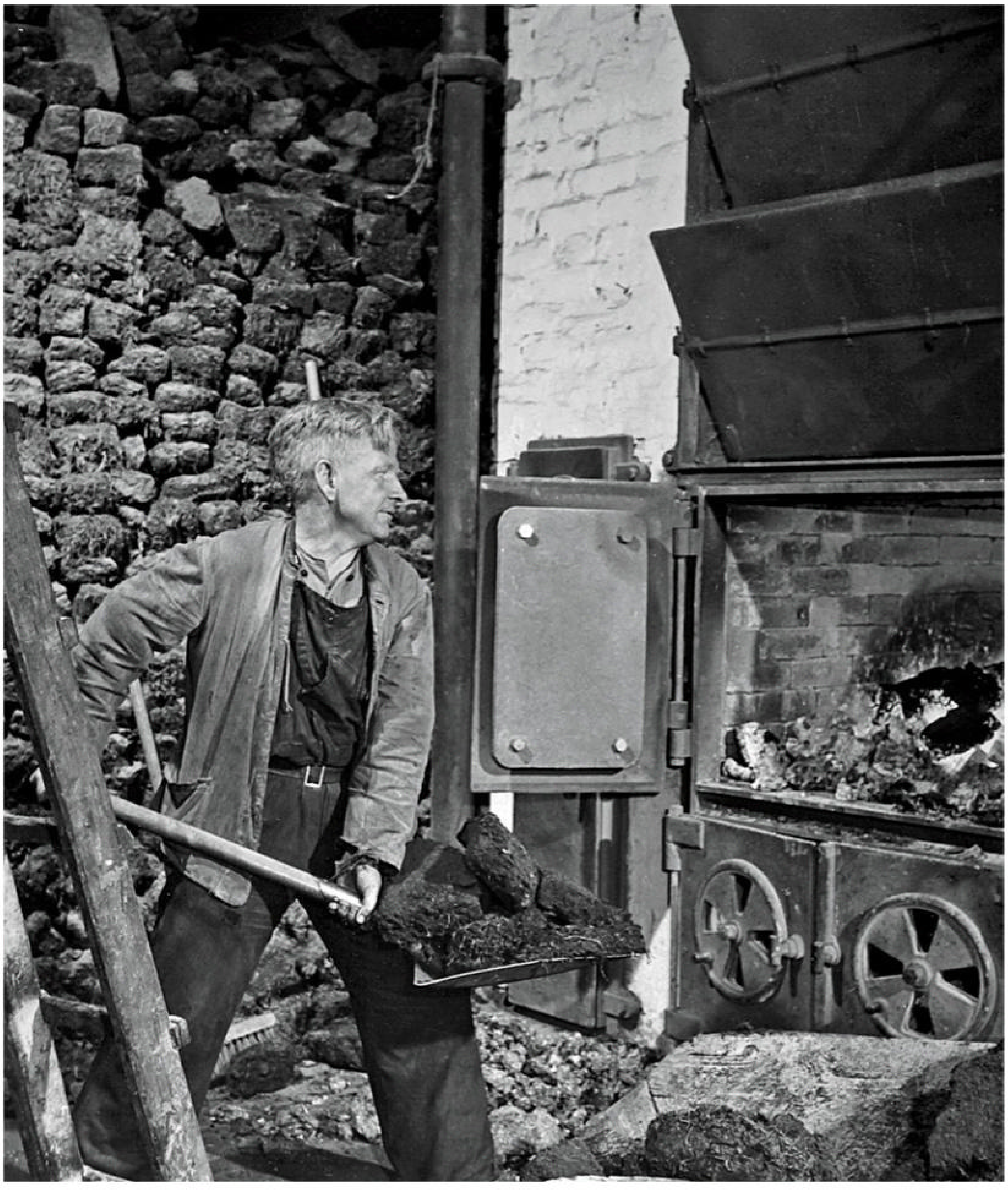
Kyle Norrington

Vintage Wine Estates has named **Russell Joy** as COO. He succeeds Jeff Nicholson, who is retiring from the company. A two-decade wine industry veteran, Joy was most recently general manager of Napa Wine Company, and prior to that was vice president of California operations for Ste. Michelle Wine Estates.

Riboli Family Wines has named **Susan Doyle** as vice president of vineyards and winemaking, a new role at the company. A 30-year industry veteran, Doyle was most recently vice president, operations and winemaking for Quails Gate Winery and West Coast Partners and prior to that served with Diageo Chateau & Estate and MacMurray Ranch among others. In her new role she will be responsible for overseeing vineyard and winemaking planning, implementation, and winemaking and vineyard operations for all Riboli brands produced in California.

Richard Booth has been appointed president of Drake's Organic Spirits. Booth served with Southern Glazer's for 35 years, culminating as vice president-general manager of the South Florida division. He joined Drake's last year as a board member and subsequently took on responsibility for its East Coast business. Now he'll serve as president of the Minneapolis-based company, which produces organic spirits under its namesake brand as well as Boxtails RTDs and distributes to 44 states. mw

Danielle Palecek Driscoll



Feeding the beast: A maltman fills the furnace with dried peat at this unnamed Scotch whisky distillery in a photo from 1940. The furnace sends fragrant peat smoke up to the malting loft, where the barley dries and becomes imbued with peat flavor.

PHOTO BY KEYSTONE-FRANCE/GAMMA-RAPHO VIA GETTY IMAGES

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